

SurgiLink Office User Manual

vs. 3.074



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Welcome to SurgiLink Office.

Thank you for choosing SurgiLink Office for your Office management needs. We are confident you will find SurgiLink Office to be more than adequate to manage your office financial, billing and patient tracking needs. SurgiLink office is designed to be used in an Anesthesiology office(s) or Surgeon's office and has specialized reports and functions to automate your billing needs. A patient scheduler is included in the package. The capabilities of this software package are quite astounding allowing an unlimited number of workstations running Windows XP with the potential for 40 individual physician or nurse practioners and 36,000 active patients. The Insurance module is fully able to bill standard HCFA or Medicaid forms and envelopes or communicate with the latest ANSI 4010 electronic billing language. All fully encrypted and HIPAAS compliant. The following pages will help you with the initial database setup (please perform first), patient entering, charge and payment entering and finally creation of a HCFA insurance form or electronic insurance submission. If during your first year of use you decide not to continue using this package, we will be happy to refund your full purchase price with documented deactivation of the product. This manual is arrange in the order we would recommend you use this product. If you wish to use it professionally we would appreciate the opportunity to come out and assist with the final installation and fine tuning to your practice. Please review all areas of this manual as many important points are concentrated at the end. Visit our web page at www.SurgiLink.com.



SurgiLink Medical Office Billing Software

Home Program Samples Reports Scheduler Download Contact Us About Us

SurgiLink Office is an exciting Windows XP based **Anesthesia and Surgical office billing system** that includes a comprehensive billing and scheduling package. Charges, Receivables, Insurance Claim Forms, Patient Statements, Electronic Claim submission and a Rich Report Capability are all part of the package. Claim forms include the HCFA-1500 form in a paper or electronic print image format or NSF v3.01 and ANSI 4010 (HIPAAS compliant). All formats can be uploaded to WebMD or Medicare for processing. All for the low price of **\$9995.00 with no additional charge for unlimited workstations.**

SurgiLink Office Software

- 1 Patient Locator
- 2 Insurance Claims
- 3 Insurance Transactions
- 4 Print Statements
- 5 Database Access
- 6 Report Cards
- 7 Online
- 8 Web SurgiLink

SurgiLink Office has many exciting features

- Windows XP design, work on a single laptop or a Full Multi-User Network. No Necessity for expensive Servers.
- Easy buttons to push for quick access to information.
- Built in Complete Patient Scheduler/Appointments
- Network ready with no extra charge per workstations.
- Handles 40 Providers maintaining all records separate.
- Up to 36,000 active patients.

Getting Started:

SurgiLink Office Software

Welcome to SURGILINK!

To set up initial files complete the next four fields

Senior Provider Last Name

Your Three Initials

A personal password

ReEnter Password

Please write down your password and note
The initial Administrative password is 'surgeon'
You will need the Administrative password
to Add other users or change passwords
Press F9 when done (ESCAPE exits)

Thank you, for selecting SurgiLink Office as your medical office software choice. When SurgiLink Office is started for the first time, several files are initialized to your personal needs. The above initial screen will be shown with this first start. Please take a moment to carefully fill in the four fields. You will have to remember your three initials and password that you now select to reenter SurgiLink Office in the future so key these entries carefully and thoughtfully.

Enter the Primary Doctors Last name in the first box. Then enter your (not the doctor's) three initials. Now choose any personal password that is private to you and enter it in the next two fields.

You are now ready to go! Press **F9** and you will be taken to the [main menu page](#). Please note that SurgiLink automatically assigns 'surgeon' as the administrative password. This can be changed in the [password management](#) section. This password is necessary to enter the Report module and to assign new user passwords.

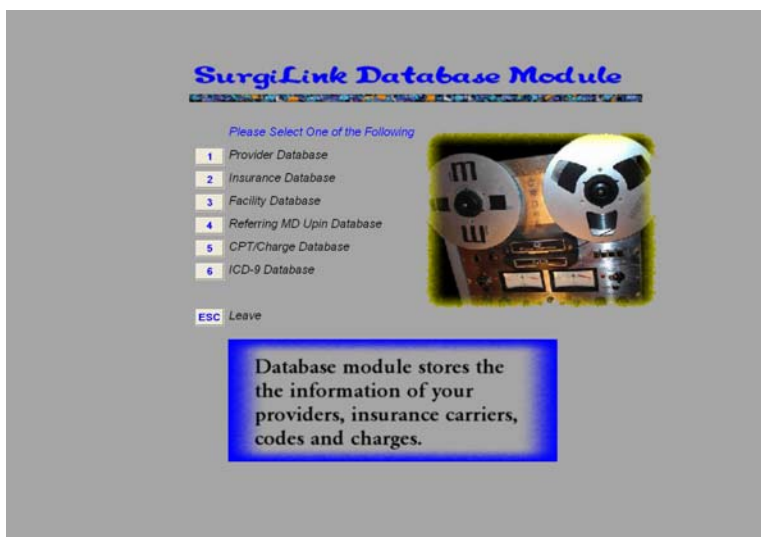
Please Proceed to the Provider Database Area as soon as possible.

Databases

The word ‘database’ seems daunting. It simply indicates this is a central collection of numbers and names. In SurgiLink Office, the database area can be accessed from many convenient areas as you will see, but to begin with we would recommend you enter some of the primary physician’s information that SurgiLink Office will need immediately. Prior to patient data entry please go to the Database module from the Main Menu page below by pressing ‘5’ with the keyboard or mouse to begin data entry.



Once in the Database module, select number ‘1’ to enter **provider information**.



The following fields will need to be filled out.

Provider Database

Please Start by selecting the number assigned to the Provider ---> 01 - KLOSAK

Last	KLOSAK	NSF Electronic File Information	
First	JOHN	Degree MD DO	MD
Initial	J	BA0_9 'provider medicare'	
SSN	352453740	BA0_12 'medicaid number'	
Birth Date	10141954	BA0_14 'BCBS number'	
Gender	M	BA0_24 'State license number'	
Main Office Information		FA0_23 'Provider ID'	
Street line 1	870 36TH AVENUE	FA0_58 'Tax ID #'	
Street line 2		FB0_15 'State DEA #'	
City	MOLINE		
State	IL		
Zipcode	61265		
Office phone	(309) 784-9162		
Provider work number			
EIN number	36-4514653	SSN yes	
UPIN number	E18985		
NPI number			
Select State	ILLINOIS	Expiration date	
License number	036-080710	07312005	
DEA number	AL2079324	12312007	
Select State	IOWA	Expiration date	
License number	28385	10012006	
DEA number	BK5935166	12312006	

Leave Save

ESC F9

Generally don't capitalize as upper case is the default, and move between fields by pressing the tab or enter key. (notice that shift/tab will move the opposite direction). Fill out the fields completely prior to using SurgiLink Office for production usage. For testing purposes you may simply fill in the name and SSN, address (office) and date of birth. Of note are the NSF fields on the right of the page. These can generally be left blank as the NSF format for electronic communication is being phased out by most carriers as it is not HIPAAS compliant. These fields will disappear from future SurgiLink Office versions.

Most of the fields are self explanatory. Notice there is room to enter numbers for 2 different states in the license area if you happen to be in a practice that borders two states.

Very Important to press F9 to save prior to exiting or going to the next practioner!!!!!!

Doctors or Nurse Practioners can be assigned numbers 02 – 40 by going to the selection box at the top of the page and simply choosing the desired number and repeating the above field entries for that practioner. Again press F9 when done with each Practioner.

Insurance Database

Insurance Company Database

Start by Selecting the Company Name --> AARP

Insurance Company Name Select to Add a New Company Name

AARP F5

Claim submission Medicare Medicaid Champus Group Other

Street line 1 3200 EAST CARSON ST. Precert Phone number

Street line 2 NAIC number

City LAKEWOOD Additional number

State CA Print Anesthesia Minutes on HCFA claim Yes Print

Zipcode 90712

Enter Provider Insurance Numbers for Paper Claims

	KLOSAK	ABDULLAH	DOCTOR 3	DOCTOR 4	CUNNINGHAM
Group #	554390	554390	554390	554390	554390
Individual #	L72593	L85770			L72591

Next 5 Doctors -> Rt Arrow
Prior 5 Doctors <- Lt Arrow

Enter Provider Insurance Numbers for Electronic Claims

Group #	554390	554390	554390	554390	554390
Individual #	L72593	L85770			L72591

Leave Save Changes Store Paste Delete Insurance
ESC F9 F7 F8 Del

This is where insurance carriers should be entered. These only need to be entered once and then they will be available for all future entries for this carrier. Also the group and individual provider numbers are entered once and can be easily copied from carrier to carrier as generally they don't change. To begin select 'F5' to enter a new carriers name. enter the name of the carrier (*note: if you have several carriers with the same name such as 'AETNA' with one being from El Paso and another from Boise ID. You may wish to label one AETNA (el Paso) and the second AETNA (Boise) for ease of identification.*) Again proceed with filling out the fields. Note that provider names are listed above the group and individual numbers if you entered them in the provider database above. If you are an anesthesiologist billing service and would like the anesthesia minutes listed separately on the HCFA for this carrier check the box indicated above. Generally this is 'yes'.

Please note the following:

Please note the following to automate ID number entry

A real time saver is included with this database. Many carriers have the same group and individual numbers (generally mimicking Medicare). Once you have entered a provider 's numbers for a carrier, pressing 'F7' will store the numbers internally (until you close SurgiLink office). Simply press 'F8' here and the numbers will be automatically inserted for all 40 providers. To repeat, if you are entering a new insurance carrier, simply go to Medicare first and press 'F7' to store the numbers. Now enter the new carrier as above and when it is time to type in all the ID numbers , simply press 'F8' and the fields will be filled. These values are stored until you exit SurgiLink so you don't need to press F7 again.

Remember to save each carrier with 'F9' prior to leaving or entering a new carrier.

This is also where insurance carriers can be deleted from the system or edited for billing addresses or other information.

Facility Database

Any location, inpatient or outpatient that your providers work at will need to be entered here. A facility will need to be entered here prior to entering charges. Again access this Database from the main menu page and selecting '5' to enter the database module and then selecting '3' to enter this module.

Facility Database

Start by selecting the facility name

Facility Name: GENESIS EMERGENCY ROOM F5

Street line 1: 1227 EAST RUSHOLME STREET

Street line 2:

City: DAVENPORT

State: IA

Zipcode: 52803

telephone#: 5634211000

Place of Service code (Office - 11, Hospital - 21, E.R. - 23, A.C.C. - 24, Outpatient - 22): 23

HCFA claim: 23

DPA claim:

Electronic Claim type: 23

Facility ID code:

Leave: ESC Save: F9 Delete Entry: Del

Press the 'F5' button to enter a new location or select a location from the drop down menu to edit. Enter the name of the facility and again press 'Enter' or 'Tab' to move from field to field entering the requested information. The place of service code should be entered for the facility for the HCFA and electronic claim type. Generally these will be the same though occasional exceptions exist. A facility ID code is not currently required by most carriers. If known please enter.

Remember to save with 'F9' prior to leaving or entering a new facility.

Referring Provider Database

Generally all patients to a surgeon or anesthesiologist's office will have a referring provider. For the anesthesiologist this will be the surgeon or Family medical doctor. SurgiLink Office requires an entry here for billing purposes. All your referring doctors will need to be entered here. *(Note: that when a new patient is entered in SurgiLink Office, you can access this database from the new patient page to enter the referring doctor at that time and enter it into this database).* Generally it is preferable to enter all your referring doctors here. Enter this database from the main page through the database module and selecting '4' for the Referring Provider Database. Again press 'F5' to enter a new referring doctor and UPIN number.

Referring Doctor Database

ABDULLAH	AFSANA	H01011
ABDULLAH	AFZAL	H36054
Ackland	Candyce	G73047
Acosta	Helbert	H21988
Ade	David	D15061
Ade	Thomas	C44931
Adler	Stephen	C38481
Aguilar	Steven	F94239
Ahearn	Michael	D16625
Ahmad	Anis	D10439
Ahmed	Fareeduddin	A14595
Ahuja	Deepak	E64554

Start by selecting the UPIN code to modify or review or select NEW *New Entry* **F5**

Last Name First UPIN

Remember to push F9 to save New or Altered

Leave *Save* *Delete Entry* *Export* *Import*

ESC **F9** **Del** **F6** **F7**

Remember to Save your entry with 'F9' prior to leaving.

You may also export or import this list to a spreadsheet here for external modification or review.

CPT/Charge Database

The CPT database is a critical database for anesthesia and surgical practices. You will want to spend time understanding and correctly entering the information here as it will impact your charging habits and entries. This database is entered from the main menu by pressing '5' and again selecting '5' to enter the CPT Database.

CPT Database

CPT	Charge	ICD	Modifier	Base Units
00000	RETURNED CHECK NSF	00000		
10060	I&D OF ABSCESS	10060	100.00	
10120	I&D REMOV FB SUBCUT	10120	191.36	
10121	I&D COMPLICATED	10121	401.12	
10140	I&D HEMATOMA SEROMA FLUID	10140	218.46	
10160	PUNCT ASPIR ABSCESS HEMATOMA B	10160	140.60	
10180	I&D DRAINAGE COMPLEX PO WOUND	10180	275.16	
11010	DEBRIDEMENT INC FOREIGN BODY	11010	493.66	
11040	DEBRIDEMENT SKIN PARTIAL THICKN	11040	74.48	
11041	DEBRIDEMENT SKIN FULL THICKNESS	11041	108.34	
11042	DEBRIDEMENT SKIN & SUBCUTANEOUS	11042	154.32	
11043	DEBRIDEMENT SKIN SUBCUT AND MU	11043	361.28	

Start by selecting the CPT code to modify or review

New Entry F5

Procedure	CPT code	Charge	ICD code	Modifiers	Base Units

Remember to push F9 to save New or Altered

Commercial rate per unit	75.00	For anesthesia use only			
Medicare rate per unit	33.00	Commercial minutes per unit	12	P1	0
Additional rate per unit	15.00	Medicare minutes per unit	15	P2	0
Additional rate per unit		Additional minutes per unit		P3	1
Additional rate per unit				P4	2
				P5	3

Leave Save Export Import Delete Entry

ESC F9 F6 F7 Del

Anesthesiology billing offices will want to immediately enter the dollar rate per unit time that they will be charging. Most offices have several rates for different carriers and five fields are allowed here. Enter the dollar and cents amount per unit you desire as above. The minutes per unit are also specified here and generally are 15 for Medicare and 12 commercial though 3 fields are allowed if you need an addition minute per unit rate. The illness severity score will be familiar to anesthesia billers as the ASA score and are entered here. If you would like extra billing units for P3 or above enter these here. (note generally enter 0 for P1 and 2, 1 for P3, 2 for P4 and 3 for P5 is entered).

Press 'F5' now to enter a new CPT code and charge or select one from the list box to edit.

CPT Database

CPT	Charge	ICD	Modifier	Base Units
00000	RETURNED CHECK NSF	00000		
10060	I&D OF ABSCESS	10060	100.00	
10120	I&D REMOV FB SUBCUT	10120	191.36	
10121	I&D COMPLICATED	10121	401.12	
10140	I&D HEMATOMA SEROMA FLUID	10140	218.46	
10160	PUNCT ASPIR ABSCESS HEMATOMA B	10160	140.60	
10180	I&D DRAINAGE COMPLEX PO WOUND	10180	275.16	
11010	DEBRIDEMENT INC FOREIGN BODY	11010	493.66	
11040	DEBRIDEMENT SKIN PARTIAL THICKN	11040	74.48	
11041	DEBRIDEMENT SKIN FULL THICKNESS	11041	108.34	
11042	DEBRIDEMENT SKIN & SUBCUTANEOUS	11042	154.32	
11043	DEBRIDEMENT SKIN SUBCUT AND MU	11043	361.28	

Start by selecting the CPT code to modify or review. New Entry F5

Procedure	CPT code	Charge	ICD code	Modifiers	Base Units
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Remember to push F9 to save New or Altered

Commercial rate per unit	<input type="text" value="75.00"/>	<i>For anesthesia use only</i>	Commercial minutes per unit	<input type="text" value="12"/>	<i>Additional Units per Risk Score</i>
Medicare rate per unit	<input type="text" value="33.00"/>		Medicare minutes per unit	<input type="text" value="15"/>	P1 <input type="text" value="0"/>
Additional rate per unit	<input type="text" value="15.00"/>		Additional minutes per unit	<input type="text"/>	P2 <input type="text" value="0"/>
Additional rate per unit	<input type="text"/>				P3 <input type="text" value="1"/>
Additional rate per unit	<input type="text"/>				P4 <input type="text" value="2"/>
Additional rate per unit	<input type="text"/>				P5 <input type="text" value="3"/>

Leave Save Export Import Delete Entry
ESC F9 F6 F7 Del

Depending If the CPT is for anesthesia, surgery or medical different fields will need to be filled out. Generally for an anesthesia service the procedure name, and CPT code and Base units will be entered. Many of these are included with SurgiLink Office but variations exist and need to be checked. If an ICD code ,such as for cataract surgery is known, it should be entered here as it will be automatically entered in charges later avoiding reentry later. For surgical or medical services you will want to specify a charge here. If you would always like a modifier to be associated with a CPT such as 26 for professional componenet only. Type it in here. *(Note: you have to enter either a base unit or a charge for each CPT code. Multiple charges are not allowed here but can be edited later.)*

Remember to Save your entry with 'F9' prior to leaving or entering a new charge.

Please note to edit a charge you may search the list box by name or CPT code and press 'Enter' or double click the entry with your mouse. You may also export the list to a spreadsheet here or import a list here. *Caution is suggested here as errors are commonly introduced by external spreadsheets.* Be sure to back up files prior to this function.

ICD9 Database

Any ICD-9 code used in SurgiLink will need to be entered in this database prior to use. Many common legal codes are included but each practice is different and you should enter only codes that you are certain are legal and will not be rejected by your carriers. This module is entered from the main menu by selecting '5' for databases and the '6' for ICD-9 database.

The screenshot shows the 'ICD Database' window. At the top, there is a list of ICD-9 codes and their descriptions. Below this list, there is a prompt: 'Start by selecting the ICD code to modify or review'. To the right of this prompt are two buttons: 'New Entry' and 'F5'. Below the prompt, there are two input fields: 'Description' and 'ICD code'. Below these fields, there is a reminder: 'Remember to push F9 to save New or Altered'. At the bottom, there are three buttons: 'Leave' (ESC), 'Save' (F9), and 'Delete Entry' (Del).

ICD Code	Description
440.30	UNSPECIFIED GRAFT OF EXTREMITIES UNSPEC.
038.11	STAPHYLOCOCCUS AUREUS
038.9	BLOOD INFECTION
150.1	MALIGNANT NEOPLASM OF THORACIC ESO
150.2	MALIGNANT NEOPLASM OF ABDOMINAL ES
150.3	MALIGNANT NEOPLASM OF UPPER THIRD
150.4	MALIGNANT NEOPLASM OF MIDDLE THIRD
150.5	MALIGNANT NEOPLASM OF LOWER THIRD
151.0	MALIGNANT NEOPLASM OF CARDIA
151.1	MALIGNANT NEOPLASM OF PYLORUS
151.2	MALIGNANT NEOPLASM OF PYLORIC ANTR
151.3	MALIGNANT NEOPLASM OF FUNDUS OF ST

Start by selecting the ICD code to modify or review

New Entry F5

Description ICD code

Remember to push F9 to save New or Altered

Leave Save Delete Entry

ESC F9 Del

Again pressing 'F5' will allow a new ICD9 code to be entered or select from the drop down menu to edit an existing code.

You can also enter this database directly at the time of charge entry if you find an ICD-9 code lacking. See charge entry.

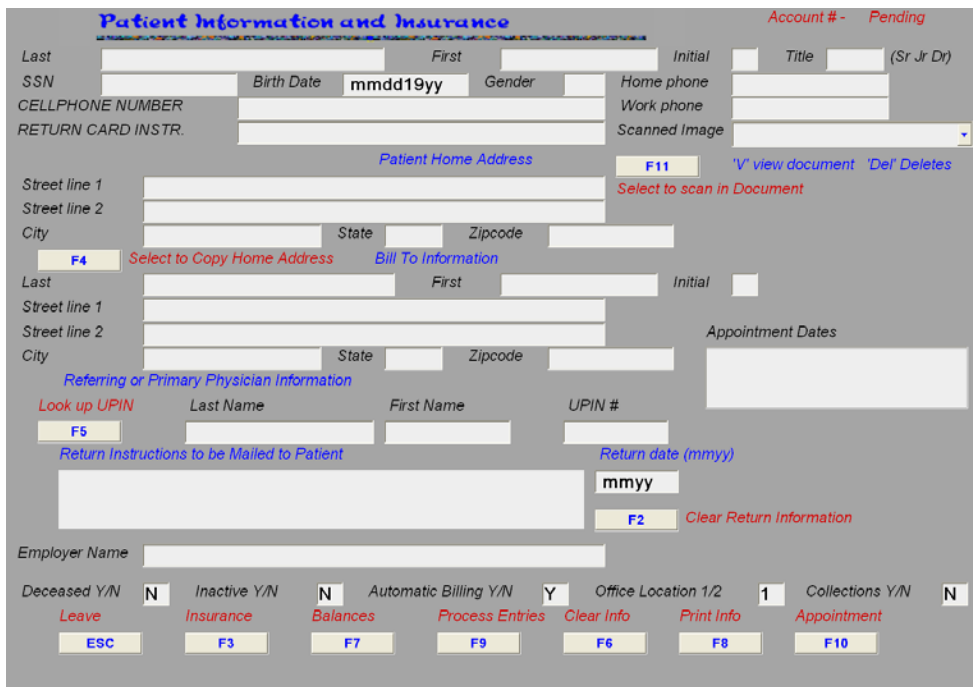
Remember to press 'F9' to save an entry prior to exiting or entering a new code.

New Patient Entry

Once you have reviewed the databases and put in some preliminary information about your practice as described in the above sections, you are now ready to begin entering patient information. Initiating a new patient entry can be done in 3 ways. Perhaps the easiest from the main menu is simply to press the 'New Patient' Quick Button shown here.



The most common method is to use a 'Hot-Key' combination ALT-N (press the ALT key and the N key simultaneously). This will **exit** (without saving) wherever you are in SurgiLink Office and begin a new patient entry. Lastly, you may select from the main menu '1' Patient Locator, and then 'N' to initiate a new patient entry. All of these methods will bring up a Patient Demographic Page shown here.

A screenshot of a complex form titled "Patient Information and Insurance". The form is divided into several sections with various input fields and buttons. At the top right, it says "Account # - Pending". The first section contains fields for "Last", "First", "Initial", "Title", "SSN", "Birth Date" (with a date picker set to "mmdd19yy"), "Gender", "Home phone", "CELLPHONE NUMBER", "Work phone", "RETURN CARD INSTR.", and "Scanned Image". Below this is a section for "Patient Home Address" with fields for "Street line 1", "Street line 2", "City", "State", and "Zipcode", and a button "F11" labeled "V view document Del Deletes Select to scan in Document". Another section for "Referring or Primary Physician Information" includes fields for "Last", "First", "Initial", "Street line 1", "Street line 2", "City", "State", "Zipcode", and "Appointment Dates". There is also a section for "Referring or Primary Physician Information" with fields for "Look up UPIN", "Last Name", "First Name", "UPIN #", and a button "F5". Below this is a section for "Return Instructions to be Mailed to Patient" with a "Return date (mmyy)" field set to "mmyy" and a button "F2" labeled "Clear Return Information". At the bottom, there is a section for "Employer Name" and a row of checkboxes for "Deceased Y/N", "Inactive Y/N", "Automatic Billing Y/N", "Office Location 1/2", and "Collections Y/N". Below these are buttons for "Leave", "Insurance", "Balances", "Process Entries", "Clear Info", "Print Info", and "Appointment".

Each field is described here. *Note that you move field to field with the Enter or Tab key and Shift-Tab will retard one field. Only upper case is allowed but do not use you cap lock or shift key as SurgiLink Office does this for you.* Buttons will be described after the field descriptions.

Patient information

Last	Enter Patient's last name
First	Enter Patient's first name
Initial	Middle initial
Title	Two character Title (Mr., Ms, Dr, Jr) for mail purposes (not mandatory).
SSN	Social Security Number
Birth Date	8 digit birth date (must be month,date,year)
Gender	M/F
Home phone	10 digits with no ()- allowed
Work phone	10 digits with no ()- allowed
Definable	User defined in Utility/Field defaults
Definable	User defined in Utility/Field defaults
Street Line 1	Patient Address
Street Line 2	Patient Address
City	Patient City

State Patient State (2 characters)

Zip code Patient zip code 5 or 9 numerals

Bill to information

Generally the same as above and pressing 'F4' will auto fill the fields, otherwise enter the responsible spouse or parent or party name and information.

Referring Provider Information

It is highly recommended to enter referring providers and surgeons in the Database Module prior to entering a New Patient as this avoids typographical errors and speeds use of this section. If you have previously entered this provider simply press 'F5' and select from the alphabetical list.



Last Name	First Name	UPIN #
ABDULLAH	AFSANA	H01011
ABDULLAH	AFZAL	H36054
Ackland	Candyce	G73047
Acosta	Helbert	H21988
Ade	David	D15061
Ade	Thomas	C44931
Adler	Stephen	C38481
Aguilar	Steven	F94230
Ahearn	Michael	D16625
Ahmad	Anis	D10439
Ahmed	Fareeduddin	A14595

Else carefully type in the name and UPIN required for billing.

Appointment Dates The appointment date window will automatically have the dates that the patient is scheduled for a procedure or appointment. See Scheduling. No direct entry is allowed here.

Patient Instructions You may want to mail your patients a reminder each month of appointment or procedures. Here you can type instructions for the patient, such as, 'Please call our office to arrange an office visit etc.' After the instructions are entered, enter a 4 digit return date and these labels can be printed from Utilities/Process return cards on labels and mailed on post cards monthly. The date can be as far in the future as you wish.

Employer Name Required by some carriers.

Deceased Y/N Default is N.

Inactive Y/N Default is N. You may wish to make a patient inactive once placed in collections to remove his debt from report inclusion. Also once inactive and 3 years have past, if not in collections, SurgiLink Office may reuse his account number.

Automatic billing Default is Y. Generally this should be checked yes and when you generate your monthly statements, this account will be included. You would indicate 'N' if you don't want a monthly statement mailed such as for a Medicaid patient or courtesy patient.

Office location Default is 1. If you are billing for several profit centers that you wish to track separately in the report module, you may specify 1-9 in this area and tracking will be automatic. For most practices generally this is left '1'.

Collections Default is 'N'. If a patient is turned into collections for non payment of funds, check 'Y'. this will prevent SurgiLink Office from reissuing the account number so you have a permanent record of this data.

Buttons (Demographic Page)

- F2 Clears Patient Instructions.
- F3 Toggles to and back Patient Insurance Page.
- F4 Copies patient information to Bill to information.
- F5 Selects Referring Doctor.
- F6 Clears the page (caution here).
- F7 Saves entry and proceed to Financial Transaction Module.
- F8 Prints the Demographic information for office use.
- F9 Saves entry and returns to main menu.
- F10 Saves entry and proceeds to scheduler.
- F11 Scans a page into Account if attached scanner detected.

Please note the following Now to not loose data.

In the upper right corner of the window is the assigned account number. If this has pending listed then the data is NOT saved. Pressing 'Escape' in SurgiLink Office generally will exit the module without saving or altering the existing data so if you leave this module now your entries will be lost. (a warning will be given).

There are 4 ways to save the data and have an account number assigned.

- 1) Press **F9**. An account number will be assigned and you will return to the main menu
- 2) Press **F7**. An account number will be assigned and you will proceed to the Financial Transaction Module where you can enter a charge.
- 3) Press **F10**. An account number will be assigned and you will proceed to the Scheduler. Note that the minimum information to enter the scheduler is the full name, phone and Date of Birth and SSN. You do not have to enter all the other fields to schedule a new patient appointment. This can be done at the office visit.
- 4) Press **Alt-S**. generally not recommended but if you must leave without entering all the required information, this will assign an account number.

Patient Insurance Information

Generally you will want to enter the patient insurance at this time. Note that pressing 'F3' will toggle back in forth between the demographic page and insurance page. *Information is not saved by going to the insurance page.*

Patient Insurance Information

Account # - Pending
'INSERT' fills Name & SSN

Primary

Cardholders name
Relationship ☐ SELF ☐ CHILD ☐ SPOUSE ☐ OTHER
Group# ID#
Street line 1
Street line 2
City State Zipcode
Precert telephone # NAIC code
Comment
Clear

Secondary

Cardholders name
Relationship ☐ SELF ☐ CHILD ☐ SPOUSE ☐ OTHER
Group# ID#
Street line 1
Street line 2
City State Zipcode
Precert telephone # NAIC code
Comment
Clear

Tertiary

Cardholders name
Relationship ☐ SELF ☐ CHILD ☐ SPOUSE ☐ OTHER
Group# ID#
Street line 1
Street line 2
City State Zipcode
Precert telephone # NAIC code
Comment
Clear

Leave Back Page Balances Process Entries Insurance Database
ESC F3 F7 F9 F8

(CTRL P)-selects primary (CTRL S)-selects Secondary (CTRL T)-selects Tertiary

Page 17 Sec 1 17/10 At 4:4 Ln 29 Col 1 ESC TRK EXT OVR 10:43 AM

Notice that Insurance names and addresses cannot be directly typed in. This may seem inconvenient but is necessary to prevent different names being used for the same carrier and inevitable typographic errors. To enter the primary insurance, press **Ctrl-P** or click the Primary button with the mouse. A drop down window will appear with an alphabetical list of the carriers you have entered in the Insurance Database (described in the database section). Simply select the proper carrier from the list and the information will be filled in. If the carrier was not entered previously, you may conveniently proceed now to the insurance database and not loose you place here by pressing 'F8' and enter the Insurance Database and make the entry now. When you save the new entry you will automatically come back here and may select the new entry from the drop down window above. Be sure to check the proper box for relationship. And enter the group and ID #.

Note: that pressing the 'Insert' button while in the ID# field will automatically transfer the patients SSN to this field . Very convenient for Medicare as the SSN and ID# are the same except for one appended letter. Pressing 'Insert' when in the Insured name field will transfer the last and first name of the patient to the field.

Repeat the above to enter secondary or tertiary insurances. Note : press **Ctrl-S** for secondary and **Ctrl-T** for tertiary carriers.

*Remember – information not saved unless **F9, F7 or F10** are pressed as indicated above and an account number is assigned.*

Financial Transaction Module

(gateway to charges & payments)

The heart of SurgiLink Office and generally the starting place for any established patient. Here is where Charges and Payments are entered. Insurance claims are made both paper and electronic. Patient demographics can be altered. Statement printed. Most databases also can be accessed from here. You will want to fully review this section. To enter this area simply press 'F7' in a new or established patient demographic or insurance page. (Alternatively, this module may be entered from the main menu page – numeral '3', and then supply the account number or name.)

Phys#	Service	Posting	CPT	Charge	Payment	Refund	Writeoff	Balance
05	20050406	20050407	99243	00217.24				217.24
05	20050406	20050418	99243		00095.57			121.67
05	20050406	20050418	99243				00111.67	10.00

Available Insurances: JOHN DEERE PREMIER, IA MEDICARE

Comment:

Balances: KLOSAK, ABDULLAH, DOCTOR 3, DOCTOR 4, CUNNINGHAM, Next 5 Doctors

Total: .00, .00, .00, .00, 10.00

30 days: .00, .00, .00, .00, 10.00

60 days: .00, .00, .00, .00, .00

>90 days: .00, .00, .00, .00, .00

Buttons: Leave, ESC, Next, F3, Prior, F4, Charge, F5, Payment, F6, Review, V, Delete, Del, Restore, R

The patient name and account numbers are shown at the top. Filed Charges, Payments, Refund and Writeoff are listed and sorted. Each can be individually selected for review or editing. The aged balances for each provider is shown at the bottom. Each Button will be reviewed at the end of this section, but lets proceed to entering a new Charge from here.

New Charge Entry

Press '**F5**' from the Financial Transaction Module and a New Charge Page will be displayed.

Charge Information Account # - 14528

Last KLOSAK First MELVIN Initial L
 SSN 343228295 Birth Date 09025933 Gender M Home phone 7157770946
 Physician Supplier # 01 - KLOSAK (Note - The Insert Key will autofill dates and fields)
 Date of Posting 20050507 Dates of Service From 20050507 Thru
 Emergency Service Y/N N Date Able to return to work
 Dates of Total Disability From Thru (Note - The +/- keys will increase or decrease dates)
 Hospitalization Dates From Thru Illness Date (may leave blank)
 Name of Facility where service rendered F5
 Referring or Primary Physician Information CAIRNS RSCOTT D90007
 Procedure F6 CPT code Charge
 ICD-9 code F7 Clear Modifiers F8 Base units Type of service 1
 Procedure F6 CPT code Charge
 ICD-9 code F7 Clear Modifiers F8 Base units Type of service 1
 Procedure F6 CPT code Charge
 ICD-9 code F7 Clear Modifiers F8 Base units Type of service 1
 Units or Minutes of Svs. 1 Anesthesia Start time (0800) 1=medical 2=surgery 7=anesthesia
 Assignment ? Y/N Y Anesthesia Stop time (1000)
 Preauthorization # NONE Round time down Round time up
 Comment Select anesthesia rate
 Available Insurances JOHN DEERE PREMIER Select minutes per unit
 ESC Discard
 F2 Calculate Anesthesia Charges
 F3 ICD Database
 F4 CPT Database
 F9 Save
 Is Patient's Condition Related to -
 Employment? Y N
 Auto Accident? Y N
 Other Accident? Y N
 JJK

Notice most of the information is automatically transferred limiting errors and repeat entries. After you select the provider this charge is for you will need to enter the following fields.

Date of Posting Generally today's date (may use +/- key to advance or retard all date fields and 'Insert' will place today's date in ALL date fields)

Date of Service

From The date of Service

To Generally the same as 'From' unless a series of visits.

Emergency Indicator Y or N.

Return to work date Not mandatory

Disability Dates Not mandatory

Hospitalization Mandatory for Inpatients

Facility Mandatory to select facility where service provided. Press ‘F5’ to select from drop down window. *Note: must be entered first in the facility database described in the database section.* generally arrow down to the facility (or press the first letter of the facility) and press “Enter” to transfer to Charge field.

Charge Line F6, F7 and F8

To enter the CPT code of the Service press F6. Notice that 3 separate charges are allowed per New Charge entry. You may recall that a HCFA form allows 6 entries per individual form. Generally all similar charges that are done on the same day and facility may be grouped here as you would on a HCFA. Press F6 now to enter the first Charge. A drop down box will be presented

Select Procedure and press 'ENTER'			
00000	RETURNED CHECK NSF	00000	
10060	I&D OF ABSCESS	10060	100.00
10120	I&D REMOV FB SUBCUT	10120	191.36
10121	I&D COMPLICATED	10121	401.12
10140	I&D HEMATOMA SEROMA FLUID	10140	218.46
10160	PUNCT ASPIR ABSCESS HEMATOMA B	10160	140.60
10180	I&D DRAINAGE COMPLEX PO WOUND	10180	275.16
11010	DEBRIDEMENT INC FOREIGN BODY	11010	493.66
11040	DEBRIDEMENT SKIN PARTIAL THICKN	11040	74.48
11041	DEBRIDEMENT SKIN FULL THICKNESS	11041	108.34
11042	DEBRIDEMENT SKIN & SUBCUTANEOUS	11042	154.32
11043	DEBRIDEMENT SKIN SUBCUT AND MU	11043	361.28
11044	DEBRIDEMENT SKIN SUBCUT MUSCLE	11044	454.44

and you may search this by name or CPT code. Once found press enter. *Note If a CPT/charge was not entered previously, you may enter the CPT database now and not loose your place by pressing ‘F4’ and enter the CPT information.* Return here and select as above. You have to enter a dollar charge or a Base unit for the service in order to proceed. Enter a legal ICD9 code or press F7 to enter. *Note that the ICD database can also be entered now by pressing ‘F3’.* Remember to check the Type of Service entered. 7 is used for anesthesia and will be automatically entered if you enter Anesthesia start and stop times below. Also enter any modifiers for ASA score now or press F8 to access from a list. *(if you desire different modifiers in your copy of SurgiLink Office contact your vendor).*

Units of Service For surgical or medical services generally left 1. For anesthesia with a type of service ‘7’ will be calculated from the start and stop times.

Anesthesia Start	For anesthesia service enter the beginning and ending 4 digit time.
Anesthesia Stop	Enter the ending time. Units will reflect minutes now for TOS 7.
Assignment	Y or N (<i>may be set in Field Defaults</i>).
Preauthorization	Enter a preauthorization number if available.
Round Time up	For anesthesia times. Do you wish orphan minutes to be rounded up or down in units.
Any comments	Enter if desired.

Buttons

- F2** Calculate Anesthesia Charges. Press F2 now if you have any TOS 7 entries for anesthesia and you will be offered in a drop down window to select the charge per unit and minutes per unit. Once selected, any service with a blank charge and An indicated Base unit will have the charge calculated and will include any modification for risk units as indicated. Note that these charges and rates are entered in the CPT database module discussed under databases and can be modified now by pressing F4 and entering the rates.
- F3** Enter the ICD database to enter a legal code and return here.
- F4** Enter the CPT database to enter a legal code or rate.
- F9** Save Charge(s). Will check for missing required information and then save each charge to the Financial Transaction module. You will be returned now to that module.

Payment Entry

Payment Entries like Charge entries are entered through the Financial Transaction page by pressing **F6**. In SurgiLink Office all Payment, Refunds and Writeoffs have to have a previously entered charge. charges and payments are linked in this fashion. When a payment is entered (by pressing **F6**), you will be shown a list of charges sorted by provider and date entered on this account.

Account # - 14528

Last: KLOSAK First: MELVIN Initial: L
SSN: 343228295 Birth Date: 09025933 Gender: M Home phone: 7157770946

Select the Charge this payment is to be applied
Press F9 or Enter when done

Phys#	Service	Posting	CPT	Charge
05	20050406	20050407	99243	00217.24

Available Insurances: JOHN DEERE PREMIER, IA MEDICARE

Balances

Discard ESC Process **F9**

Select the charge the payment is for from the list and press enter or **F9**.

A Payment Entry page will now be opened.

Account # - 14528

Last: KLOSAK First: MELVIN Initial: L
SSN: 343228295 Birth Date: 09025933 Gender: M Home phone: 7157770946

Physician Supplier #: 05
Dates of Service: From 20050406 Thru 20050406
Hospitalization Dates: From Thru
Name of Facility where service rendered: DAVENPORT OFFICE
Procedure: OFFICE ER CONSULT NEW EST
CPT code: 99243 Charge: 217.24
Date of Posting: 20050507 Please Select the Correct Box

Amount: Payment received Refund Write Off
Check#: Insurance Co. **F8** press F8 to select

Comment:

Available Insurances: JOHN DEERE PREMIER, IA MEDICARE

Balances: CUNNINGHAM 10.00

Discard ESC Process **F9**

F5 Scan EOB
F6 Insert EOB
F7 View EOB

JJK

Notice most of the information is entered for you and cannot be altered. Simply enter the amount of payment, check the payment box and enter the check # if know. ***Note this important time saver: if this is a combined Medicare check for many different services and patients and you previously entered the same check number. You can push the insert key and the last check number will be inserted.***

Press **F8** to select the source of payment and your done.

Remember to press **F9** to save the entry and return to the Financial Transaction page.

A special note is needed here regarding Scanning. It is very convenient at this time to scan in an EOB from the carrier. Simply press **F5** and scan in the document and it will be linked to this page for later viewing if needed. Also note that similar to the Check # entry, if you scanned in an EOB from a combined payment, you can press **F6** and the EOB will be inserted in this page so no need to rescan combined EOBs. Please review the chapter on scanning and image acquisition in SurgiLink Office.

Refunds and Writeoffs are entered exactly the same. Simply check the appropriate box.

Editing Charges or Payments

Charges and Payments can be edited or reviewed in detail from the Financial Transactions page.

Financial Transactions Account # - 14528

Last **KLOSAK** First **MELVIN** Initial **L**
SSN **343228295** Birth Date **09025933** Gender **M** Home phone **7157770946**

Phys#	Service	Posting	CPT	Charge	Payment	Refund	Writeoff	Balance
05	20050406	20050407	99243	00217.24				217.24
05	20050406	20050418	99243		00095.57			121.67
05	20050406	20050418	99243				00111.67	10.00

Available Insurances **JOHN DEERE PREMIER**
IA MEDICARE

Comment

S Single Statement
P Patient Info
I Insurance Claim
F7 Print Ledger
F8 Clear Comment
F9 Save Comment

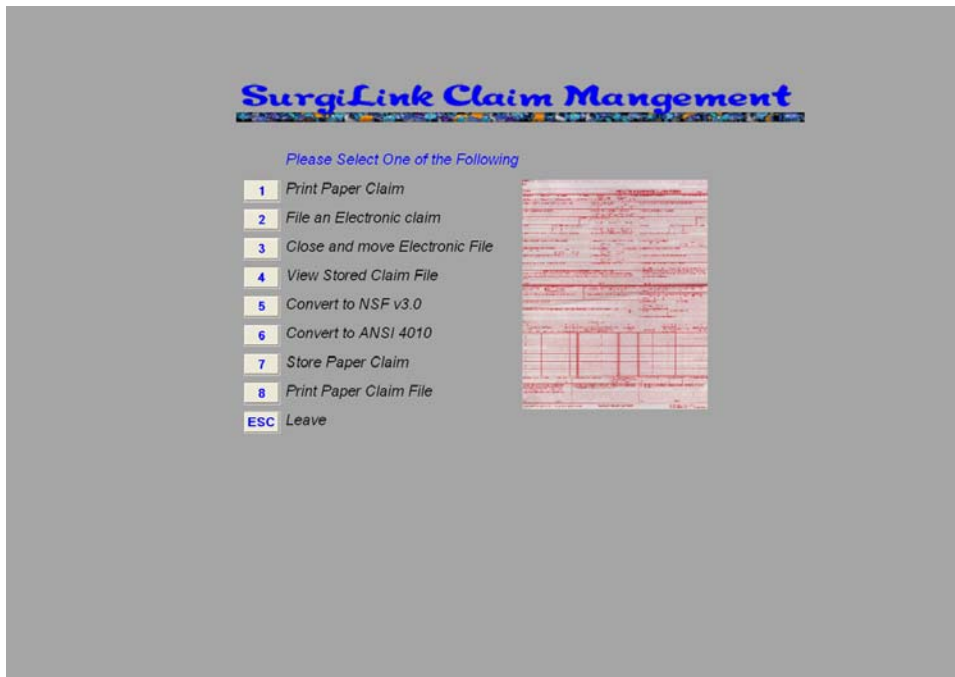
Balances	KLOSAK	ABDULLAH	DOCTOR 3	DOCTOR 4	CUNNINGHAM	Next 5 Doctors
Total	.00	.00	.00	.00	10.00	-> Rt Arrow
30 days	.00	.00	.00	.00	10.00	<- Lt Arrow
60 days	.00	.00	.00	.00	.00	Prior 5 Doctors
>90 days	.00	.00	.00	.00	.00	

Leave **ESC** Next **F3** Prior **F4** Charge **F5** Payment **F6** Review **V** Delete **Del** Restore **R**

Simply highlight the desired Charge, Payment, Refund or writeoff by cursoring up and down with the mouse or arrow keys ,and Press Enter or '**V**' to view the entered data of the charge or payment. Make whatever changes you wish and then press '**F9**'. To save the alterations. If you do not make alterations press '**Escape**' to return to this module.

Insurance Claim Module

The Button 'I' in the Financial Transaction Module is the most convenient way to file a claim or perform most insurance related transactions and is best done at the time of filing a charge. After you file a charge in the financial transaction module ,as in the above section, press the Button 'I' or the Key 'I'.



You will notice several options here. You can immediately print a claim here or store for group printing later. Both are similar so we will proceed with printing immediately now. Electronic claim filing is also very similar but will be discussed later.

Proceed with selection '1' Print Paper Claim.

SurgiLink Claim Management

Print Single Paper Claim

Select Provider Number: 01 - KLOSAK

Enter Patient Account Number: 14528

Or - Last Name: First Name:

HCFA 1500 DPA 2360

ESC Leave F9 Process Entries

Select the provider (See Provider Selection Window in Time Savers Section) and confirm that the account number is correct (should be automatically filled in) and that you desire a HCFA 1500 format. (other formats available at request).

Press **F9** to proceed.

Select Charges to Process

Account # - 14528

Last: KLOSAK First: MELVIN Initial: L

SSN: 343228295 Birth Date: 09025933 Gender: M Home phone: 7157770948

Select the Primary Company to File this Claim: JOHN DEERE PREMIER

Select the Secondary Company: IA MEDICARE

Press F9 when insurances selected F9

Leave ESC

Verify the Primary and Secondary Carriers you wish this claim sent and again press **F9** to proceed.

Account # - 14528

Select Charges to Process

Last KLOSAK First MELVIN Initial L
 SSN 343228285 Birth Date 09025933 Gender M Home phone 7157770946

Phys#	Service	Posting	CPT	Charge
05	20050406	20050407	99243	00217.24

Available charges for this provider shown
 Select up to 6 Charges for this Claim
 Press F9 when done selecting

Leave ESC Process Selections F9

Select up to 6 charges to include on this HCFA by using the mouse or keyboard with arrows and the space key to highlight as in any Windows program.

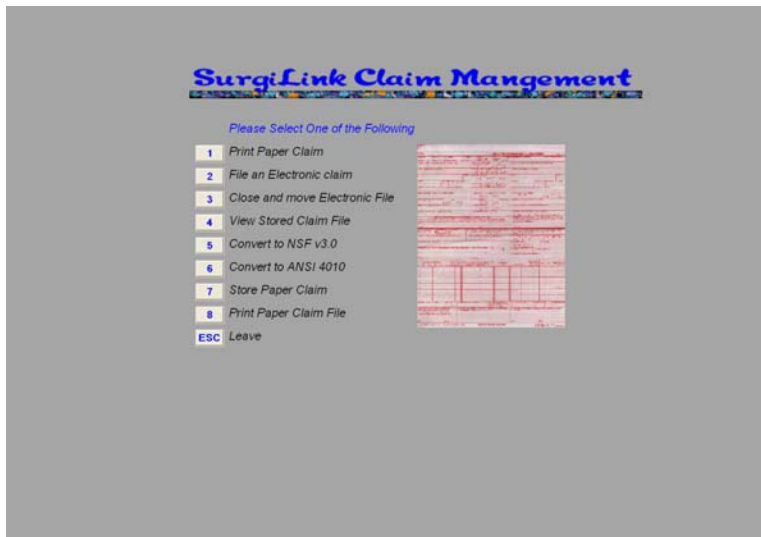
Once you have selected the charges you wished filed again press **F9**.

And your documented will be printed or stored. SurgiLink Office scans the entry to stop most omissions that cause rejections. If errors are detected you will be taken to the area of concern to complete the information.

You will notice an automatic entry in the comment area of the Financial Transaction Module. This occurs with all claim filing or patient statements.

Electronic Claims Module

SurgiLink Office has an advanced Electronic Claim Module for submitting your claims to carriers. Most Practices find it very convenient and cost efficient to submit a group of claims to Clearinghouses ,such as WebMD, rather than maintain separate files for individual carrier submission but both are supported here. If you are not a highly proficient computer user, we suggest using a clearing house as the reports generated by them and the error checking is well worth the nominal fee per claim (commonly less than a stamp). Lets proceed. We will assume you have reviewed the process of creating charges and have entered several along with the patient demographics and insurance information. Lets enter the Insurance Claim module from the Financial Transaction Module just as we did to print a paper HCFA by pressing 'I' with the mouse or keyboard. You should see the familiar Insurance Module shown here.



Choose the second selection '2' File an Electronic Claim.

You will be taken through the insurance selection and charge selection pages exactly as filing a HCFA claim above and again just like a HCFA you can select 6 charges to put on one claim form electronic or paper. Be cautious that the place of service is the same for all claims lumped together on one form.

Account # - 14528

Select Charges to Process

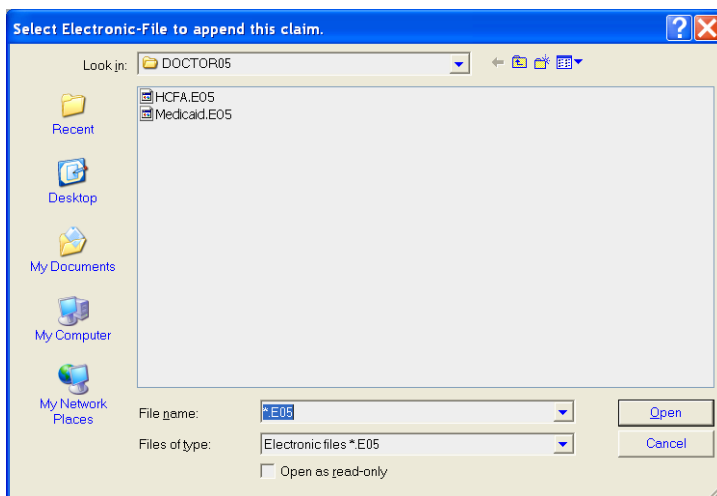
Last Name: KLOSAK First Name: MELVIN Initial: L
 SSN: 343228295 Birth Date: 09025933 Gender: M Home phone: 7157770948

Phys#	Service	Posting	CPT	Charge
05	20050406	20050407	99243	00217.24

Available charges for this provider shown
 Select up to 6 Charges for this Claim
 Press F9 when done selecting

Leave ESC Process Selections F9

After you select the charges press **F9** to proceed. After you enter the Coinsurance amount which generally is 0, you will be taken to a standard windows file selection box.



SurgiLink Office creates two standard files for all 40 practioner. They are HCFA and Medicaid which are usually reserved for stored paper claims for printing.

(The actual location of these is C:\SURGILINK\ELECTRONIC\DOCTORxx\ where xx is the numeral for each doctor).

If you wish to create an electronic file simply type the name in the file box ,such as, Medicare.Exx or WebMd.Exx. Generally you will want to enter the file WebMd.Exx.

The appendix should be Exx again where xx is the numeral representing the provider. (You only have to create the file once per provider and then it will remain available for all future use.

Press the Open key or press Enter and you should see a 'successful message' shown.

That's it your ready to enter a another claim.

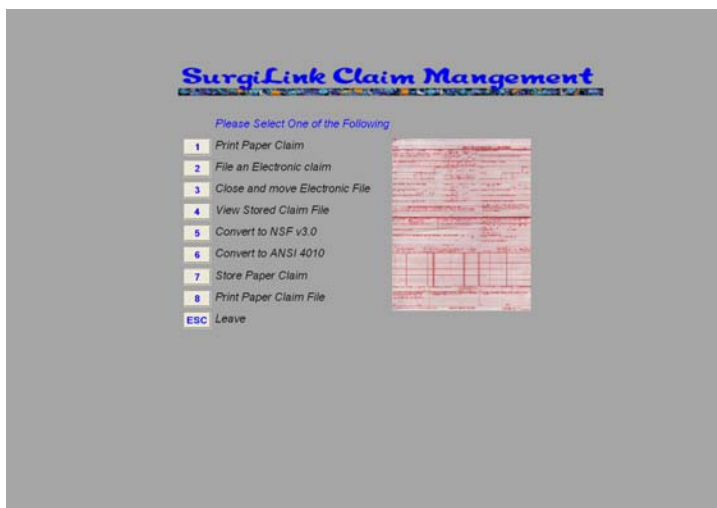
If you want to check that the claim was entered in the selected file. Review the chapter on 'Viewing a claim file, page 35.

You should also see an automatic comment entered in the Financial Transaction module indicating the Doctor, Date, CPT code(s) and insurance carrier the claim was submitted to.

Viewing a Claim File

All claim files whether Electronic or stored Paper are stored in SurgiLink Office for processing. Prior to submitting or printing the files they can be 'Viewed' to see who and what are in each and you can selectively delete claims if desired. If you wish to change the contents of a stored HCFA or claim you will need to delete it here and reenter the altered claim.

To view a claim file, Enter the Insurance module from the Financial Transaction page or the main menu with numeral '2' Insurance Claims.



Select numeral '4' View Stored Claim file. And select the provider of the claim file you wish to review (*01-40 or press the providers first letter of the last name*).

A standard file selection window will be shown and all files for this provider are available for selection. Select the file you wish to review whether stored paper or electronic and press 'Enter'.

SurgiLink Claim Mangement

Name	Insurance	Date Service	CPT	Amount
	C:\surgilink\ELECTRONIC\DOCTOR01\hcfa.E01			
ANDERS, FRED	COMPREHENSIVE	09152004	35601	1877.69
ANDERS, FRED	COMPREHENSIVE	09152004	35601	1877.69
ANDERS, FRED	COMPREHENSIVE	09152004	35601	1877.69
ARVANITIS, STEV	PRINCIPAL (CO	03152004	00918	680.00
ARVANITIS, STEV	PRINCIPAL (CO	03152004	99140	136.00
ESTES, WALTER	JOHN DEERE HE	04012004	62311	296.98
GRAHAM, EUGENE	JOHN DEERE HE	04012004	62311	544.00
LOGAN, RICKY	MAIL HANDLERS	04012004	62311	544.00
MAHER, CINDI	BCBS ILLINOIS	04012004	27096	476.00
MASON, JO	BCBS ILLINOIS	04012004	64510	476.00
MUJKANOVIC, ZIL	JOHN DEERE HE	04012004	62311	296.98

ESC Leave

Del Delete Entry

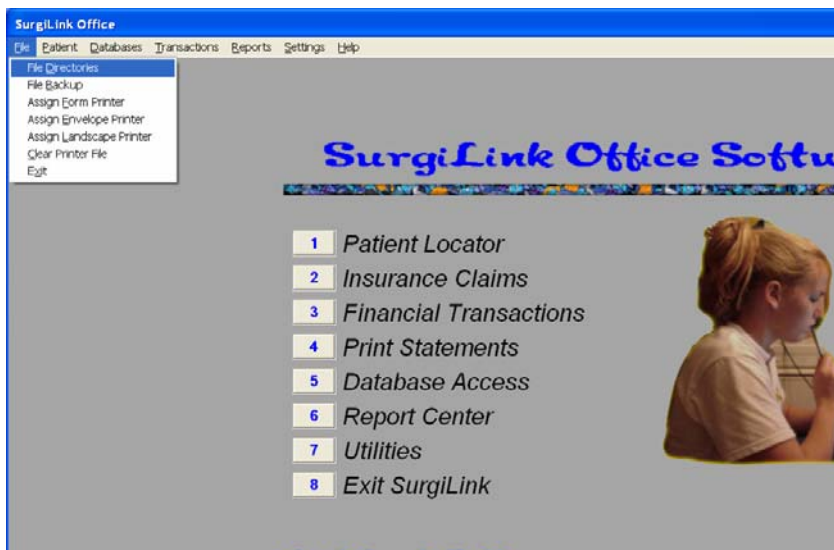
F8 Print Listbox

All the charges that are in the file will be shown and sorted as above. You may print the list if desired or delete an erroneous entry. A point is needed regarding deleting entries. If you created a Single HCFA for Mr. Fred Anders with 4 charges and stored it. You will see Anders, Fred four times listed in the box with each CPT code and charge listed individually. You cannot delete an individual line from a HCFA. If you wanted to deleted one of these charges for Mr. Anders, all the charges would be removed that were included on the HCFA so be careful to resubmit them. To delete a claim simply highlight the claim desired and press the 'Delete' key. This is a permanent deletion.

Submitting an Electronic Claim

The claims that you store in an electronic file, such as, WebMD.E02 are not in a usable format that an insurance company will accept. Many carriers will only accept electronic claims in large bulk from clearing houses (WebMD) and not individual providers. Exceptions exist, particularly with Medicare which generally will accept claims from individual providers. In order to submit or transmit a SurgiLink Office claim file to a carrier or clearinghouse, you will have to convert the file into a format the carrier or clearinghouse can accept. SurgiLink Office is particularly efficient at converting to a form called 'Print Image' which WebMD or Mdonline accepts without difficulty.

Prior to conversion, we recommend you purchase a 256 meg usb memory stick (about \$50.00 at office supply stores). Plug it into your USB port and determine which drive letter your computer assigns to it. Generally E:\ or F:\ in '*My Computer on the Start Button*'. On the main menu of SurgiLink Office, use your mouse and click the word 'File' and select File Directory as shown here.



The current settings for SurgiLink Office will be displayed as below.

Directory Page

Patient File	Select	C:\SURGILINK\PATIENT
Names File	Select	C:\SURGILINK\NAMES
Charge File	Select	C:\SURGILINK\CHARGES
Payment File	Select	C:\SURGILINK\PAYMENT
Upin/Referring Database	Select	C:\SURGILINK\DATABASE\UPIN
Insurance Database	Select	C:\SURGILINK\DATABASE\INSURANCE
Facility Database	Select	C:\SURGILINK\DATABASE\FACILITY
CPT Database	Select	C:\SURGILINK\DATABASE\CPT
ICD Database	Select	C:\SURGILINK\DATABASE\ICD9
Provider Database	Select	C:\SURGILINK\DATABASE\PROVIDER
Surgilink Help	Select	C:\SURGILINK\HELP\SURGHLP.HLP
Comment	Select	C:\SURGILINK\COMMENT
Scheduler Path Only	Select	C:\SURGILINK\SCHEDULE\
Statement BMP	Select	C:\SURGILINK\STATEMENT.DIB
Medicare Fee File	Select	C:\SURGILINK\DATABASE\MEDICARE.TXT
Inactive Account File	Select	C:\SURGILINK\DATABASE\INACTIVE.TXT
Supplier Account File	Select	C:\SURGILINK\DATABASE\SUPPLIER.TXT
Image File Path	Select	C:\SURGILINK\IMAGES\
KLOSAK		C:\SURGILINK\ELECTRONIC\DOCTOR01*.E01
ABDULLAH		C:\SURGILINK\ELECTRONIC\DOCTOR02*.E02
DOCTOR 3		C:\SURGILINK\ELECTRONIC\DOCTOR03*.E03
DOCTOR 4		C:\SURGILINK\ELECTRONIC\DOCTOR04*.E04
CUNNINGHAM		C:\SURGILINK\ELECTRONIC\DOCTOR05*.E05
Path for Closed Files		A:\

Next 5 Doctors

Rt Arrow ->

Lt Arrow <-

Prior 5 Doctors

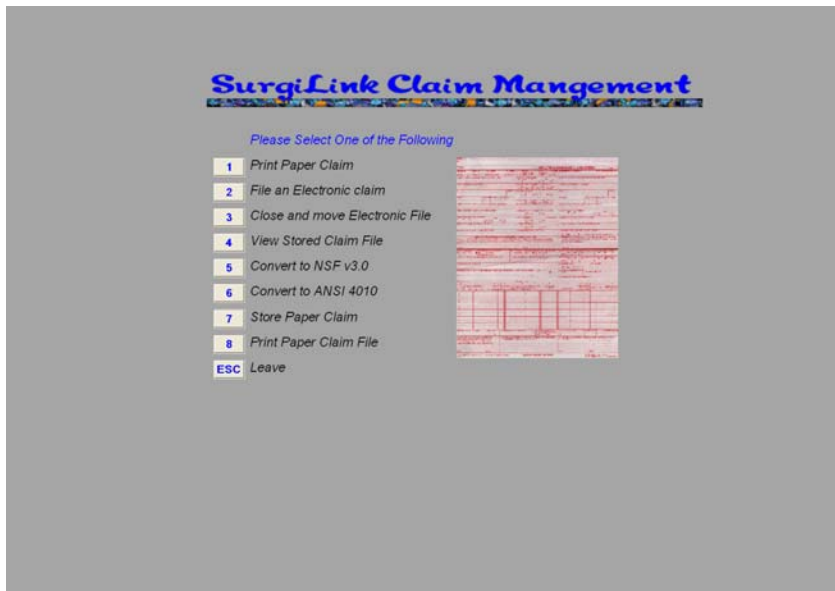
Leave Save

Enter Paths & Extensions for Electronic Claim Files

ESC F9

Change the last entry 'Path for Closed Files' from A:\ to match the drive of your memory stick i.e. E:\ and press **F9** to save and restart. You are now ready to process your files for the clearing house or insurance Carrier.

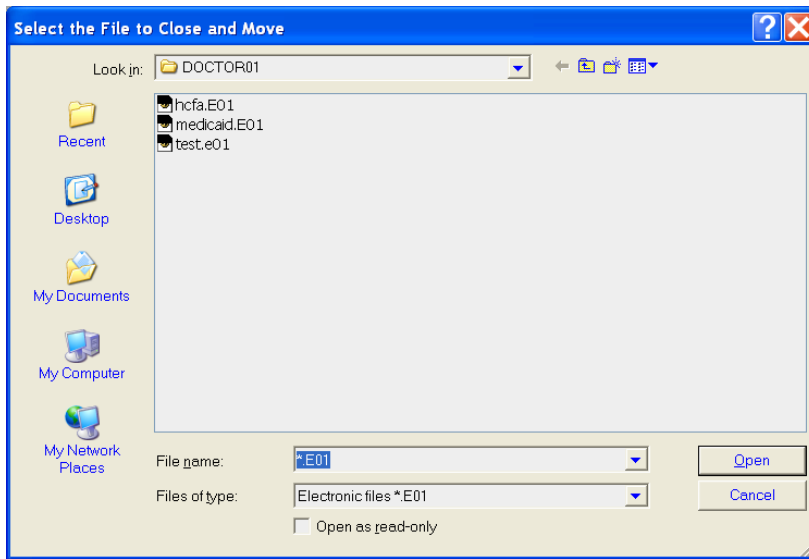
From the Insurance module accessed from the main menu or the Financial Transaction Module press '3' to close and move an Electronic File.



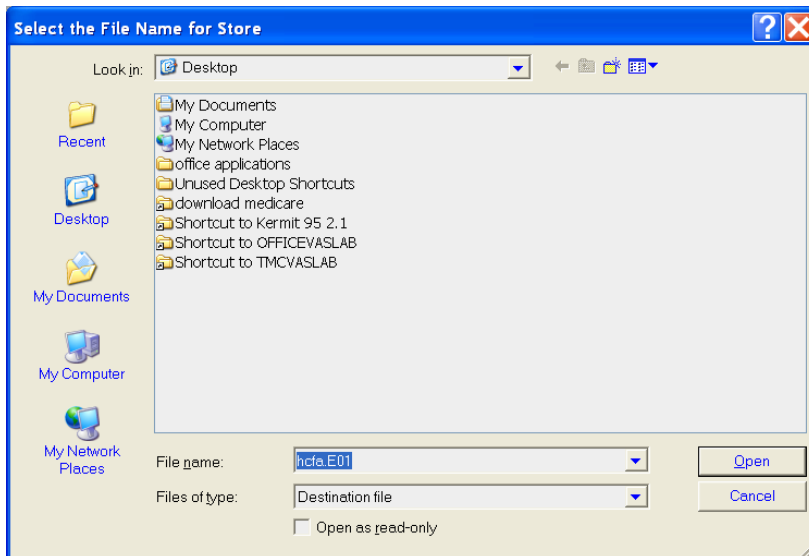
Select the provider 01-40 that you want to process



and press **F9** to continue.

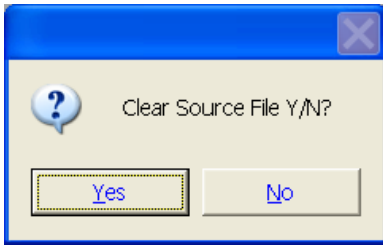


A standard file selection box will be displayed and generally you will want to select the Clearing house file such as WebMd.E01 (for provider 01) and click open. You will be prompted with a message asking to confirm if this is the right file. After you do you will be prompted with another file selection box as below and it should be pointing at the drive represented by your memory stick i.e. E:\ .



Simply click open and again a message will prompt you if this is the correct drive and file. (should be E:\ WebMd.E01 for provider1, E:\WebMd.E02 for provider 2 etc.). Click yes and the file will be processed and moved to the memory stick. SurgiLink Office will

check if the entire contents were moved and if the results are correct it will display a message 'Successful'. Click Ok



Now Click to clear the Source file and this will remove the claims from SurgiLink Office leaving only the processed files on your memory stick. It is important to clear the files once processed or you will resubmit the same information in the future. **Prior to emailing your files to WebMD please make a copy of the entire memory stick on your computers hard drive.** Most practioners find if they create a directory called C:\Submitted claims\ and create folders in this directory for the date of submission i.e. 2005 May 1. They copy all the files from the memory stick into the folder in case the files are lost or corrupted in transit You will need to contact your clearing house of choice and they are responsible for transmitting the files from you to them generally by modem or the internet with encryption.

The above procedure using the 'Close and Move Function' uses a format called print image which is used by major clearinghouses for processing. Medicare will not accept this form but uses ANSI 4010 discussed below.

ANSI 4010

Medicare and some carriers will accept files directly from providers. This can save some money as generally this service is provided free from the carriers but reports and complexity of transmission may curtail your use of this. If you decide to go this route, SurgiLink Office will support the HIPAAS compliant transmission of information as below.

First make sure the ANSI 4010 fields are correctly filled out in the Utility Module accessed from the main menu.

ANSI 4010 fields

Select The Insurance Carrier and press 'Enter'

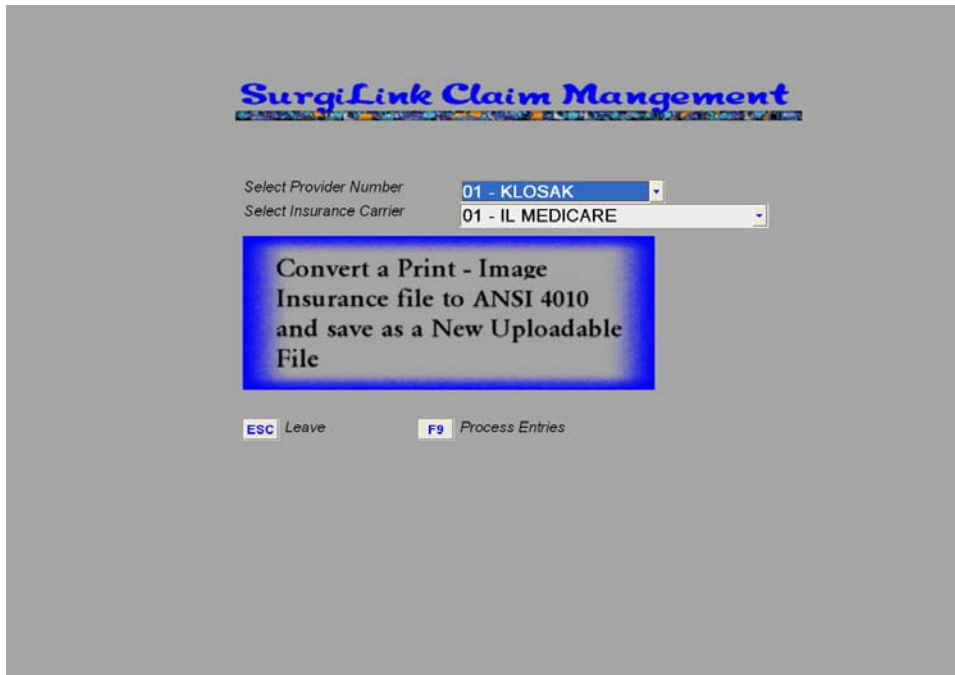
01 - IL MEDICARE

Insurance Carrier	IL MEDICARE	Production or Test (P/T)	P
Authorization type 00 or 03 (# I01)	00	Facility ID# (Where most work done)	HSP160033
Authorization information (# I02)		Security qualifier 00-no,01-yes; (# I03)	00
Application sender code (#GS 02)	77727	Security information (# I04)	NONE
Application receiver code (#GS 03)	00592	Electronic File Receiver Name	IL MEDICARE
Interchange ID qualifier (ZZ) (# I05)	ZZ	Payor ID #	00952
Interchange sender ID (# I06)	77727	Payment receiver address (Pay to)	
Interchange receiver ID (# I07)	00592	Pay to Street line 1	870 36TH AVENUE
Submitter Primary ID #	77727	Pay to Street line 2	
Receiver Primary ID #	00592	City	MOLINE
Submitter type(1 person,2 entity)	2	State (2letters)	IL
Submitter name	VASCULAR & TH	Zipcode	61265
First name if a person		Payor Address (Insurance carrier)	
Middle Initial if a person		Pay to Street line 1	PO BOX 1030
Contact Full name	JOHN KLOSAK	City	MARION
Contact Telephone #	5636507355	State (2letters)	IL
specialty code	2086S0129X	Zipcode	62959
EIN number	364318653	ANSI Additional fields	
		2010AA REF Qualifier (1G*)	1C*
		2010AA REF*1C (GROUP #)	554390

Leave Save

ESC F9

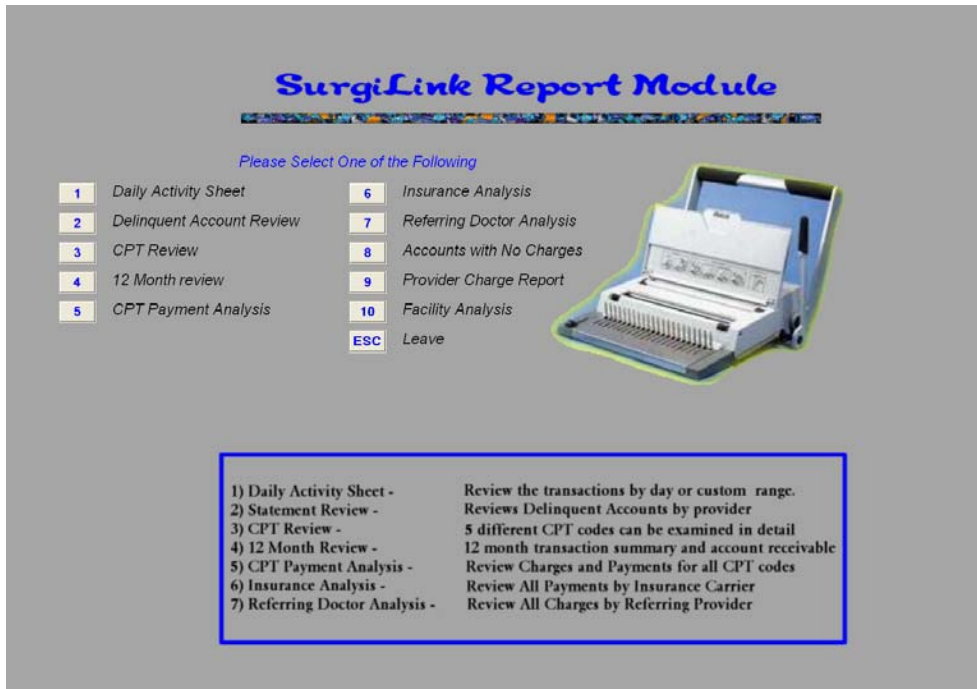
Your carrier will supply you with most of these numbers but a detailed information sheet is available from SurgiLink upon request. There is a drop down selection box at the top which allows for 3 different carriers numbers to be stored. If you need more again contact you SurgiLink Office vendor. Once these values are entered correctly the conversion of the Claim file to a ANSI 4010 is essentially the same as for the above described process to 'close and move a file'. In the insurance module, select numeral '6' Convert to ANSI 4010. You will be presented with a choice of the carriers you entered for ANSI submission under Utilities above.



Select the provider and carrier and press **F9** to continue.

An identical file selection box and storage box will be presented. If you agree with the selections click yes and again if successful SurgiLink office will offer to clear the source file for you. Remember again to save the contents of the memory stick to a folder on you hard drive prior to submitting to Medicare or the carrier. Once submitted , erase the memory stick to use again.

Report Module



One of the strongest features of SurgiLink Office is the report capability. Here you can analyze your practice for strengths and weaknesses. Find delinquent accounts and quickly remedy problems. Reviewing each Insurance Carrier is easily accomplished.

Each module will be briefly gone through here.

Daily Activity Sheet, is the module most practices use almost daily to balance their receivables. Select '1' from above.



SurgiLink Report Module

Daily Activity Report

Select Provider Number

01 - KLOSAK

Please Enter Dates to Review

Beginning Date 20050507

Ending Date 20050507

F9 Press F9 to Begin

ESC Leave

Exclude Inactive Accounts

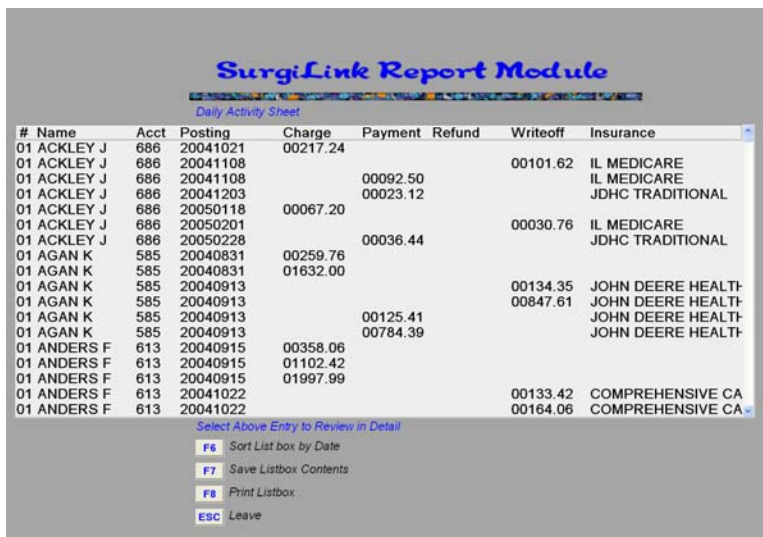
Y N

Much Faster to exclude inactive accts

Daily activity module can review a single date or a range of dates for review or printing.

Select the individual provider or if you wish select *.* for all providers. *Remember providers can be selected throughout SurgiLink Office by their numeral (01) or the first letter of the last name.* Tab down to the Beginning and ending dates and adjust them with the + and – keys to reflect the range you desire and press **F9** to begin the search.

Soon the results will be displayed as below .



SurgiLink Report Module

Daily Activity Sheet

#	Name	Acct	Posting	Charge	Payment	Refund	Writeoff	Insurance
01	ACKLEY J	686	20041021	00217.24			00101.62	IL MEDICARE
01	ACKLEY J	686	20041108		00092.50			IL MEDICARE
01	ACKLEY J	686	20041108		00023.12			JDHC TRADITIONAL
01	ACKLEY J	686	20041203					
01	ACKLEY J	686	20050118	00067.20				
01	ACKLEY J	686	20050201				00030.76	IL MEDICARE
01	ACKLEY J	686	20050228		00036.44			JDHC TRADITIONAL
01	AGAN K	585	20040831	00259.76				
01	AGAN K	585	20040831	01632.00				
01	AGAN K	585	20040913				00134.35	JOHN DEERE HEALTH
01	AGAN K	585	20040913				00847.61	JOHN DEERE HEALTH
01	AGAN K	585	20040913		00125.41			JOHN DEERE HEALTH
01	AGAN K	585	20040913		00784.39			JOHN DEERE HEALTH
01	ANDERS F	613	20040915	00358.06				
01	ANDERS F	613	20040915	01102.42				
01	ANDERS F	613	20040915	01997.99				
01	ANDERS F	613	20041022				00133.42	COMPREHENSIVE CA
01	ANDERS F	613	20041022				00164.06	COMPREHENSIVE CA

Select Above Entry to Review in Detail

F6 Sort List box by Date

F7 Save Listbox Contents

F8 Print Listbox

ESC Leave

The List displays the individual Charges, Payments, Refunds and Writeoff for the time period selected. The totals for each column are summed up at the end of the List for each

column. There are a few very powerful tools available to you now that you will want. *Note you can toggle the above list to sort by Date or Name by pressing F6* Save the contents of the box to a Spreadsheet format with F7 or Print the Contents with F8. **In most reports you may go directly to a patient's financial card from this list box if you suspect a problem or want more information. In the above list box, if you arrowed down or used the mouse to double clicked (or press enter) a patient's name, you will go to that patient financial Transaction Module.** Here you can review or edit charges and payments or proceed to the patient demographics or insurance page and edit changes. Remember to save changes with F9 or exit the financial module with Escape and you will be returned to this report page where you can continue your review. This ability to access the patient information and return to the report module is a key feature of all the Report modules and very useful for rapid review and decision making.

Delinquent Account Review

Selection '2' in the report module will bring up a menu page shown below

SurgiLink Report Module

Delinquent Account Review

Select Provider Number: 01 - KLOSAK

Specify Single Insurance Y/N: Y N Include All Insurance

Enter Days Delinquent: 30

Enter Beginning Acct #: 1

Enter Ending Acct #: 14555

Minimum Dollar Amount: 0

Ignore Inactive accts Y/N: Y N

F9 Press F9 to Begin

ESC Leave

Select the desired Provider and The minimum amount and time delinquent. May also Select a single insurance carrier or leave the default of All carriers. Press F9 to begin analysis.

here you can specify the provider and whether you wish to look for a single insurance carrier or all carriers. You can enter the minimum days the account should be delinquent to trigger a review and the minimum dollar amount to review. Generally it is best to skip inactive accounts. Press **F9** to begin.

Soon the following list will be displayed.

SurgiLink Report Module

SELECT ACCOUNT AND PRESS 'ENTER' TO VIEW DETAILED SUMMARY

-Acct	Name	Total	30 Days	60 Days	Over 90
00004	NICHOLSON NATHANIEL	\$120.00	.00	.00	120.00
00004	BCBS - ILLINOIS				
00160	HEPNER MARY	\$336.91	.00	.00	336.91
00160	PRINCIPAL (CO)				
00235	WRIGHT BARBARA	\$329.86	.00	.00	329.86
00235	UNITED HEALTH (UTAH)				
00271	JACKSON DIANE	\$675.00	.00	.00	675.00
00271	FORTIS BENEFITS				
00285	LANGE WILLIAM	\$193.25	.00	.00	193.25
00285	JOHN DEERE HEALTH-CHOICE				
00367	NOBLETSMITH LINDA	\$49.79	.00	.00	49.79
00367	IL MEDICARE				
00367	IL MEDICAID				
00369	MALMSTROM VINCENT	\$321.29	.00	.00	321.29
00369	WAUSAU INSURANCE COMPANIES				
00381	SCHULTZ	\$2928.86	.00	.00	2928.86
00421	COLLIS BARBARA	\$1141.35	.00	.00	1141.35
00421	PRINCIPAL (CO)				

F8 Print List

ESC Leave

The patient's name and insurance carriers and the amounts owed and aged by 30,60 and 90 days are listed. Note again that you can arrow down to an individual patient and press 'Enter' to go to the financial transaction module to review if a claim was sent and make decisions what to do with this delinquent account. When done pressing Escape in the Financial Transaction Module, will return to this module rather than the main menu page for continued review.

CPT Review

CPT Review is entered by selecting numeral '3'. This is a very convenient method to analyze how you are doing with certain CPT codes.

SurgiLink Report Module

CPT occurrence locator

Enter up to 5 CPT codes and a date range to examine. A sorted list will be created for your review or printing.

Beginning Date: 20050507
Ending Date: 20050507

Enter up to 5 CPT codes to locate

F9 Press F9 to Begin
ESC Leave

Enter a date range and up to 5 CPT codes for simultaneous review. The report should look similar to below.

SurgiLink Report Module

Phy	CPT	Posting	acct#	Charge	Payment	Refund	Writeoff
01	35301	20040517	565				00934.66
01	35301	20040517	565		00877.79		
01	35301	20040518	74	02031.90			
01	35301	20040519	435		00100.00		
01	35301	20040520	116	02031.90			
01	35301	20040531	179	02031.90			
01	35301	20040617	179				00671.15
01	35301	20040617	179		01360.75		
01	35301	20040621	74				00934.66
01	35301	20040621	74		00877.79		
01	35301	20040626	271	02031.90			

Select Above Entry to Review in Detail

F7 Save Listbox Contents
F8 Print Listbox
ESC Leave

Note again that individual entries may be reviewed by selecting the line in the list box and pressing 'Enter' to go to the financial transaction module. Escape will return here.

12 Month Review

This is a very nice module to look at monthly summaries of charges, payments, refunds and writeoff along with account receivable and a summary of the preceding 3 years is presented for comparison. You can also separate the results by office location or profit center (See the patient Demographic page 1-9). Once entered select the provider and year. Use the + / - sign to adjust the year and press **F9**.

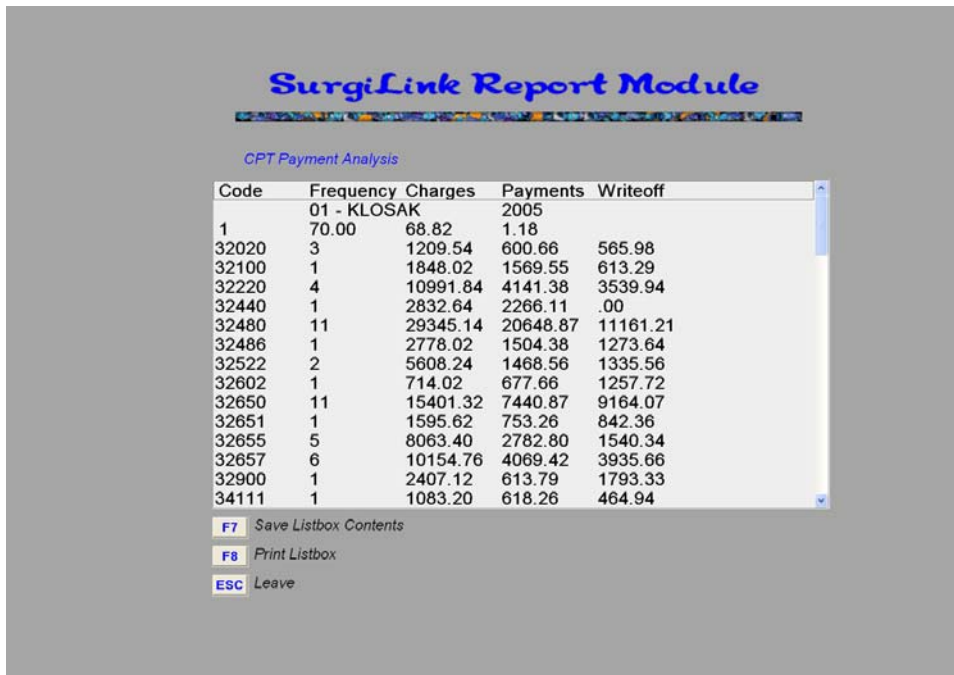
The report should look like below. With monthly summaries presented.

Physician Supplier #	1	Office Location -	1	Year -	2004	Today's date -	20050507
	Date of Posting Used			Inactive Accounts excluded			
	Jan	Feb	March	April	May	June	
Charges	86311.25	81487.08	85887.10	96047.12	70274.90	58570.73	
Payments	36869.60	45873.18	55677.12	53810.83	37405.48	49648.18	
Refunds	320.91	.00	127.00	237.98	.00	.00	
Writeoffs	27882.03	39346.53	45329.28	47582.14	29772.58	43744.63	
	July	August	Sept	Oct	Nov	Dec	
Charges	72642.70	87114.86	105223.68	69918.84	82841.04	91150.62	
Payments	28334.87	49791.48	45684.53	46211.57	47944.75	41072.46	
Refunds	.00	53.16	286.49	515.01	.00	.00	
Writeoffs	17637.46	47193.92	35611.51	30067.50	27323.18	38955.83	
	2001	2002	2003	2004			
Charges	800093.50	713986.39	819334.38	987469.92			
Payments	479556.55	394380.23	474104.93	538324.05			
Refunds	6931.63	3606.06	6776.41	1540.55			
Writeoffs	379297.64	302212.60	355119.30	430446.59			
Note : Prior 3 years not complete as inactive accts excluded.							
Leave	ESC	Accounts Receivable	132872.41				

To print this page use the PrtSc function and paste into a wordprocessor such as 'Word' and print the page.

CPT Payment Analysis

CPT payment analysis is simply just that. You select the provider and year and SurgiLink Office goes through your databases and analyses what you charge and receive for each CPT code you use. With this you can determine what percentage of your receivables is from each code and see trends over time. The results look as below.



The screenshot displays the 'SurgiLink Report Module' window. At the top, the title 'SurgiLink Report Module' is shown in a stylized blue font. Below it, a subtitle 'CPT Payment Analysis' is centered. The main content is a table with five columns: 'Code', 'Frequency', 'Charges', 'Payments', and 'Writeoff'. The table lists various CPT codes and their corresponding financial data. At the bottom of the window, there are three keyboard shortcuts: 'F7 Save Listbox Contents', 'F8 Print Listbox', and 'ESC Leave'.

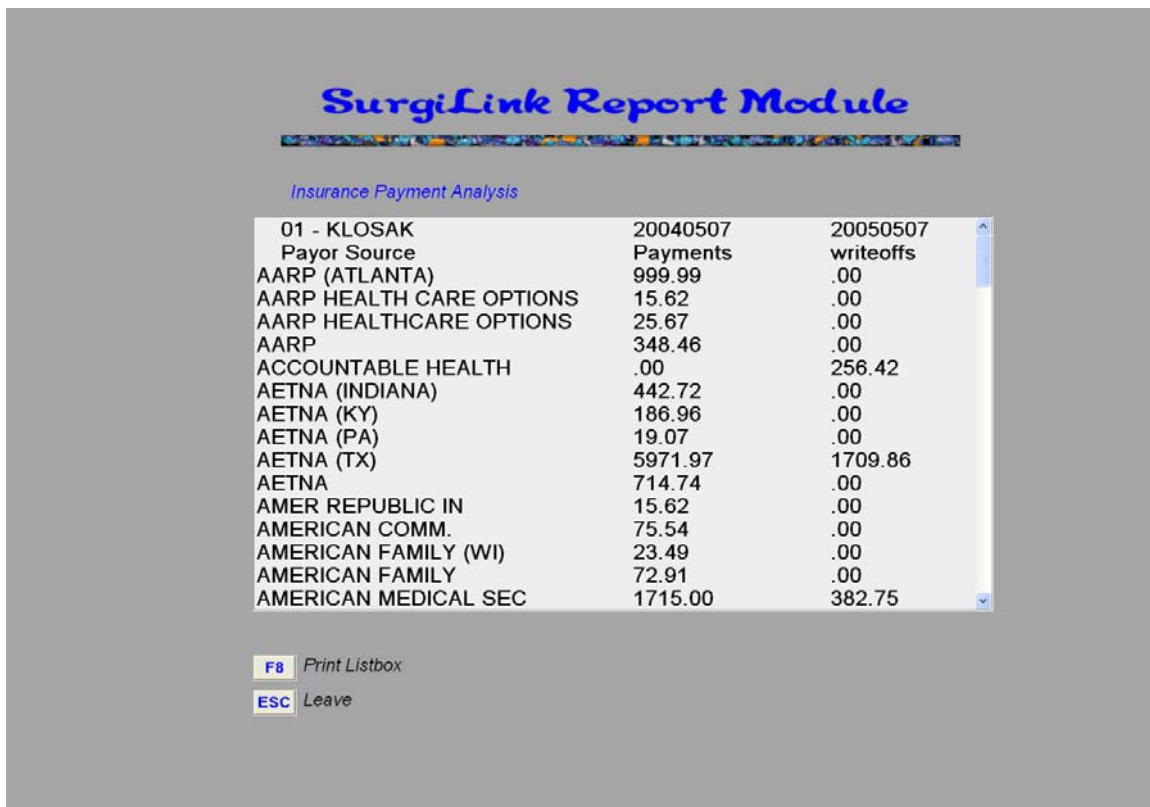
Code	Frequency	Charges	Payments	Writeoff
01 - KLOSAK 2005				
1	70.00	68.82	1.18	
32020	3	1209.54	600.66	565.98
32100	1	1848.02	1569.55	613.29
32220	4	10991.84	4141.38	3539.94
32440	1	2832.64	2266.11	.00
32480	11	29345.14	20648.87	11161.21
32486	1	2778.02	1504.38	1273.64
32522	2	5608.24	1468.56	1335.56
32602	1	714.02	677.66	1257.72
32650	11	15401.32	7440.87	9164.07
32651	1	1595.62	753.26	842.36
32655	5	8063.40	2782.80	1540.34
32657	6	10154.76	4069.42	3935.66
32900	1	2407.12	613.79	1793.33
34111	1	1083.20	618.26	464.94

F7 Save Listbox Contents
F8 Print Listbox
ESC Leave

Again you can save the list box to a spread sheet or print it for review.

Insurance Analysis

Insurance Analysis is an excellent module to determine which payers are contributing the most to your practice and make decisions regarding future contracts and their impact on your bottom line. Simply enter the module and select the year and provider to review. You should quickly be presented with this report.



The screenshot shows a software window titled "SurgiLink Report Module" with a subtitle "Insurance Payment Analysis". It displays a table of payment data for provider "01 - KLOSAK". The table has three columns: "Payor Source", "20040507 Payments", and "20050507 writeoffs". The data lists various insurance carriers and their respective payment amounts for two different periods. At the bottom of the window, there are two buttons: "F8 Print Listbox" and "ESC Leave".

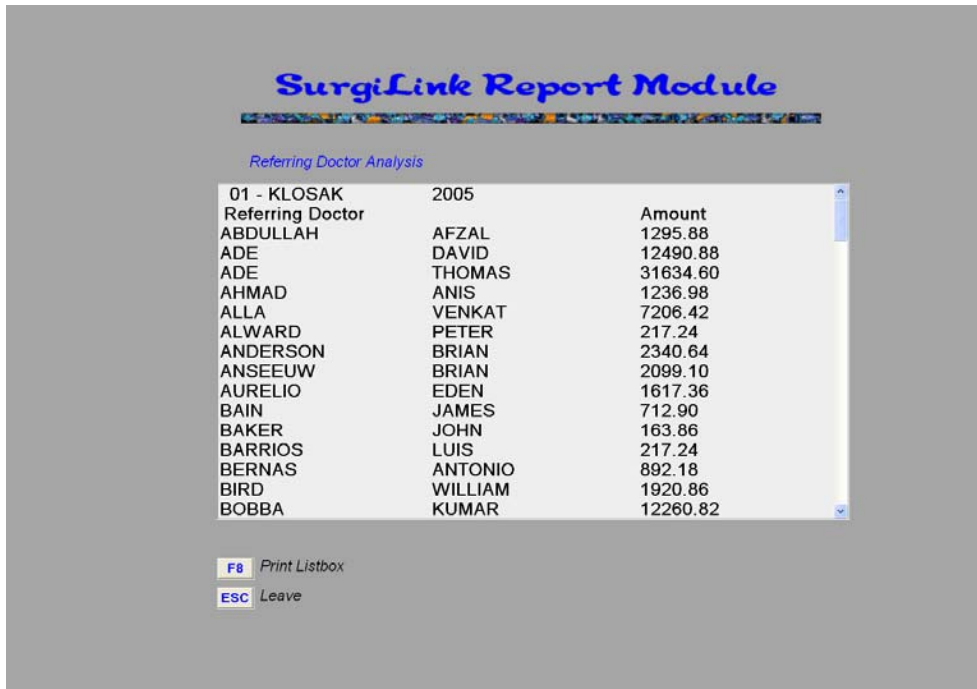
01 - KLOSAK	20040507	20050507
Payor Source	Payments	writeoffs
AARP (ATLANTA)	999.99	.00
AARP HEALTH CARE OPTIONS	15.62	.00
AARP HEALTHCARE OPTIONS	25.67	.00
AARP	348.46	.00
ACCOUNTABLE HEALTH	.00	256.42
AETNA (INDIANA)	442.72	.00
AETNA (KY)	186.96	.00
AETNA (PA)	19.07	.00
AETNA (TX)	5971.97	1709.86
AETNA	714.74	.00
AMER REPUBLIC IN	15.62	.00
AMERICAN COMM.	75.54	.00
AMERICAN FAMILY (WI)	23.49	.00
AMERICAN FAMILY	72.91	.00
AMERICAN MEDICAL SEC	1715.00	382.75

F8 Print Listbox
ESC Leave

each carrier is individually listed with the amount paid and written off. This can be saved or printed as desired for record keeping.

Referring Doctor Analysis

It pays in practice to know who is supplying you. With this module you can easily see who is sending you patient and who is not. Again enter the module and enter the provider and year and you will be presented with the following type of report.



The screenshot displays the 'SurgiLink Report Module' window. Below the title bar, the text 'Referring Doctor Analysis' is visible. The main content area shows a table with three columns: 'Referring Doctor', '2005', and 'Amount'. The table lists 20 doctors and their corresponding dollar amounts. At the bottom of the window, there are two buttons: 'F8 Print Listbox' and 'ESC Leave'.

Referring Doctor	2005	Amount
01 - KLOSAK		
ABDULLAH	AFZAL	1295.88
ADE	DAVID	12490.88
ADE	THOMAS	31634.60
AHMAD	ANIS	1236.98
ALLA	VENKAT	7206.42
ALWARD	PETER	217.24
ANDERSON	BRIAN	2340.64
ANSEEUW	BRIAN	2099.10
AURELIO	EDEN	1617.36
BAIN	JAMES	712.90
BAKER	JOHN	163.86
BARRIOS	LUIS	217.24
BERNAS	ANTONIO	892.18
BIRD	WILLIAM	1920.86
BOBBA	KUMAR	12260.82

The referring doctors name and the dollar amount of business you derived from him. Perhaps the top 30 doctors deserve a special yearly gift.

Accounts with No Charges

Generally these are patients that didn't show up for appointments but missed charges are also common in practices and it pays to review this quarterly to be sure your not missing some charges. Simply enter a provider and press **F9** to begin. You will be presented with a list box of the names and account numbers of these 'orphan' patient so you can decide what to do with them.

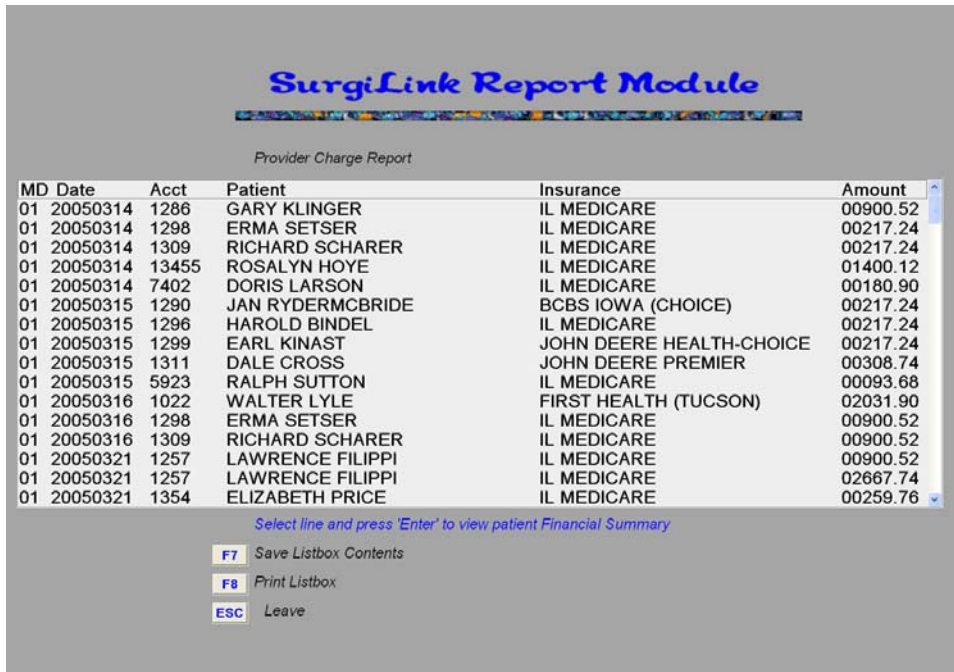


Again remember that selecting the account from the list box and pressing enter will take you to that financial transaction card for review and decision making. Escape will return you here.

Provider Charge Report

The provider charge report is accessed from the report module and after you select a provider and date range you will be provided with a list of all the charges filed for that provider during the time period entered allowing cross checking to avoid missed charges.

The report appears as below.



SurgiLink Report Module

Provider Charge Report

MD Date	Acct	Patient	Insurance	Amount
01 20050314	1286	GARY KLINGER	IL MEDICARE	00900.52
01 20050314	1298	ERMA SETSER	IL MEDICARE	00217.24
01 20050314	1309	RICHARD SCHARER	IL MEDICARE	00217.24
01 20050314	13455	ROSALYN HOYE	IL MEDICARE	01400.12
01 20050314	7402	DORIS LARSON	IL MEDICARE	00180.90
01 20050315	1290	JAN RYDERMCBRIDE	BCBS IOWA (CHOICE)	00217.24
01 20050315	1296	HAROLD BINDEL	IL MEDICARE	00217.24
01 20050315	1299	EARL KINAST	JOHN DEERE HEALTH-CHOICE	00217.24
01 20050315	1311	DALE CROSS	JOHN DEERE PREMIER	00308.74
01 20050315	5923	RALPH SUTTON	IL MEDICARE	00093.68
01 20050316	1022	WALTER LYLE	FIRST HEALTH (TUCSON)	02031.90
01 20050316	1298	ERMA SETSER	IL MEDICARE	00900.52
01 20050316	1309	RICHARD SCHARER	IL MEDICARE	00900.52
01 20050321	1257	LAWRENCE FILIPPI	IL MEDICARE	00900.52
01 20050321	1257	LAWRENCE FILIPPI	IL MEDICARE	02667.74
01 20050321	1354	ELIZABETH PRICE	IL MEDICARE	00259.76

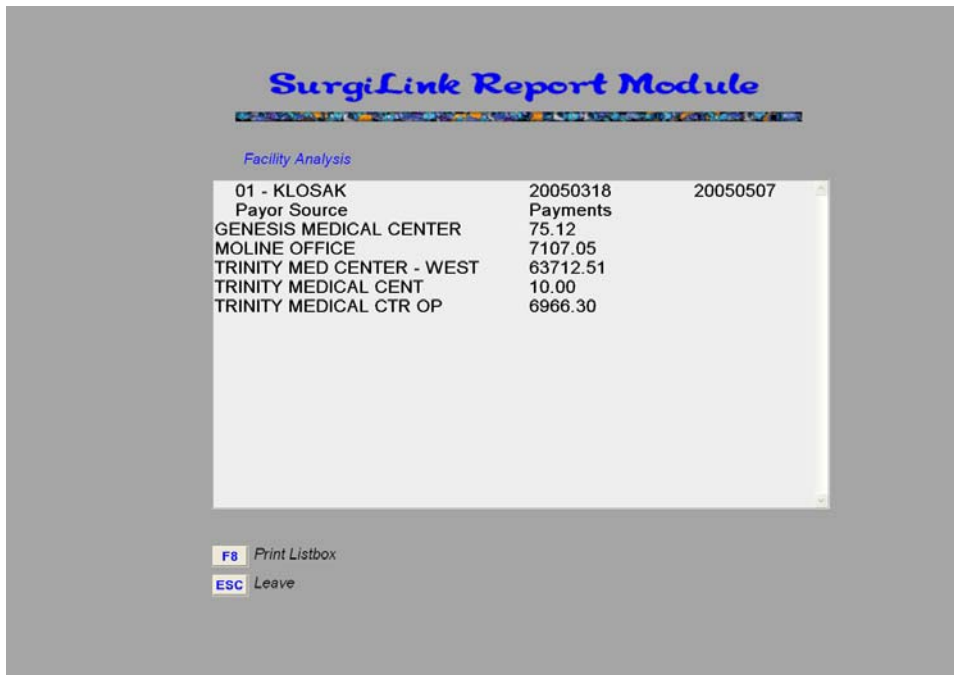
Select line and press 'Enter' to view patient Financial Summary

F7 Save Listbox Contents
F8 Print Listbox
ESC Leave

The list is sorted by date and can be saved to a spread sheet or printed and each entry can be scrolled down to and press **enter** to access the financial transaction module as discussed for other report modules. **Escape** in the Financial Transaction Module will return the user here rather than the main menu.

Facility Analysis

Facility analysis is a report accessed through the report module where the user can determine the monies received for each facility. Occasionally this is useful for tax purposes. Simply select the provider and year and press **F9**. The report should appear as below.



The screenshot shows a window titled "SurgiLink Report Module" with a sub-header "Facility Analysis". It displays a report for provider "01 - KLOSAK" for the year "20050318". The report lists payments from various facilities for the year "20050507".

Payor Source	Payments
GENESIS MEDICAL CENTER	75.12
MOLINE OFFICE	7107.05
TRINITY MED CENTER - WEST	63712.51
TRINITY MEDICAL CENT	10.00
TRINITY MEDICAL CTR OP	6966.30

At the bottom of the window, there are two buttons: "F8 Print Listbox" and "ESC Leave".

again you may print or save the list as you wish.

Scanning

Scanning documents into SurgiLink Office is a powerful tool. Hospital face sheets can be scanned into the patient demographic page by pressing **F11** and later reviewed by selecting from the drop down scan window. EOB's can also be scanned into New Payments to avoid filing and searching for later. If an EOB is necessary later simply print from file. In order to use this feature you will need a WIA compliant scanner (generally \$90.00 at an office supply store) and your ready to go. Simply follow the on screen direction or refer to the section of this manual for payments or demographics. Don't underestimate the productivity saved by not searching for an EOB and having it readily available for review. Also saves filing space.

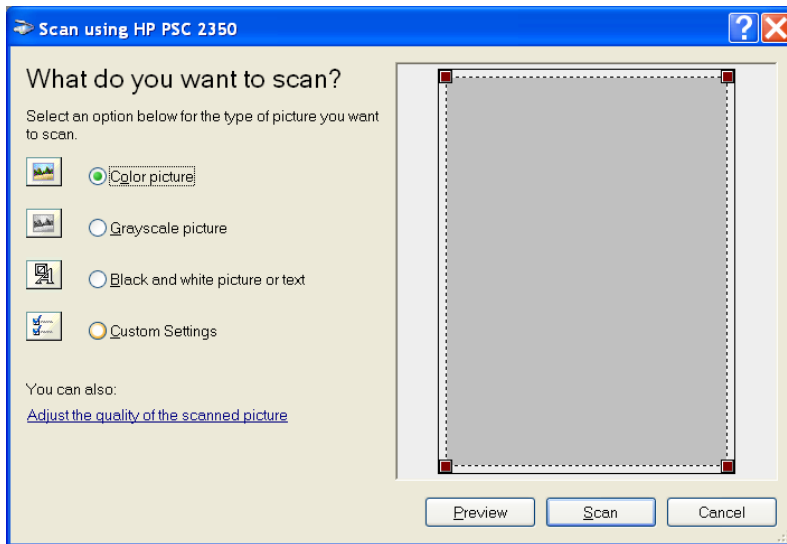
An example of scanning will be shown. From the Demographic page below, you may use the mouse and push the **F11** button or more commonly use the keyboard and press '**F11**'.

The screenshot displays the 'Patient Information and Insurance' form. At the top right, it shows 'Account # - 1'. The form is divided into several sections for data entry:

- Patient Demographics:** Fields for Last, First, Initial, Title, SSN, Birth Date, Gender, Home phone, Work phone, and a 'Scanned Image' dropdown menu.
- Address:** Fields for Street line 1, Street line 2, City, State, and Zipcode. A 'Patient Home Address' label is present.
- Referring or Primary Physician Information:** Fields for Last, First, Initial, and UPIN #.
- Appointment Dates:** A field for entering appointment dates.
- Return Instructions:** A section for 'Return Instructions to be Mailed to Patient' with a 'Return date (mm/yy)' field.
- Employer Name:** A field for the employer's name.
- Checkboxes:** Fields for 'Deceased Y/N', 'Inactive Y/N', 'Automatic Billing Y/N', 'Office Location 1/2', and 'Collections Y/N'.
- Buttons:** A row of function keys at the bottom: ESC, F3, F7, F9, F6, F8, and F10. Above these are labels: 'Leave', 'Insurance', 'Balances', 'Process Entries', 'Clear Info', 'Print Info', and 'Appointment'.

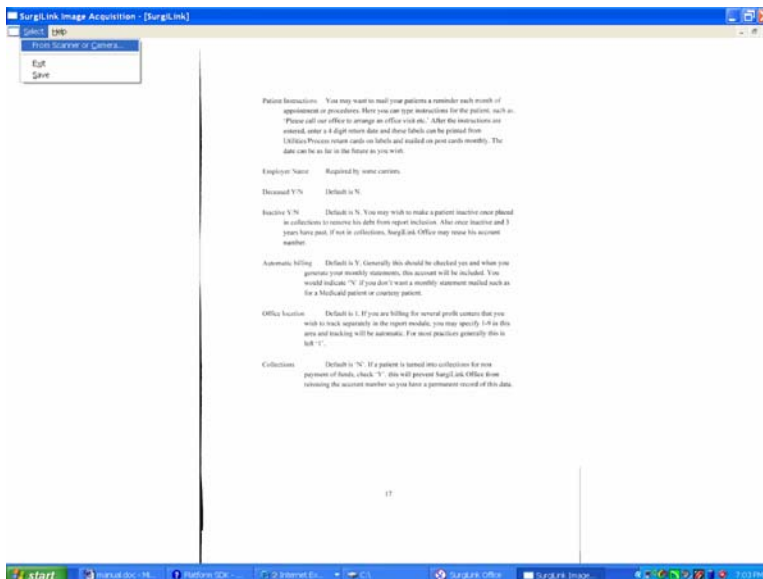
Key interactive elements include the **F11** button for scanning documents, the **F4** button for 'Select to Copy Home Address', and the **F5** button for 'Look up UPIN'.

If you have an attached scanner that is WIA compliant (as most are) the SurgiLink Acquisition program will start and a scan selection window will be presented. Generally at this point SurgiLink recommends you do not exit the process until you are done scanning. For most documents excellent resolution is obtained by selecting the 3rd option, 'Black and white picture or text'. If you must use a 'Color picture' setting for angiograms or other photographs, it is recommended to use the custom settings and use not more than 75 DPI resolution as the resulting file can exceed 3 megabytes.



After you click on Black and white picture or text, click the **S**can button.

Your document will be scanned and the results shown.



Now you will want to save by pushing **Alt-S** and then '**S**' for save or use your mouse and click the **Save** in the upper left corner shown above.

The Acquisition program will close and you should be back in SurgiLink Office. Once SurgiLink Office detects that a new file is available it will ask for a name. Enter an 8 character name reflecting the document.in the box shown below.

Enter Name of Document (8 letters max)

Done

Exit

The file will be place in the scanned Image window shown here with the number and date.

Patient Information and Insurance

Account # - 1

Last First Initial Title (Sr Jr Dr)

SSN Birth Date Gender Home phone

Definable(Utilities) Work phone

Definable(Utilities) Scanned Image **03) 20050513 TMC FACE**

Patient Home Address **F11** "V" view document "Del" Deletes

Street line 1 Select to scan in Document

Street line 2

City State Zipcode

F4 Select to Copy Home Address Bill To Information

Last First Initial

Street line 1

Street line 2

City State Zipcode

Referring or Primary Physician Information

Look up UPIN Last Name First Name UPIN #

F5

Return Instructions to be Mailed to Patient Return date (mmyy)

F2 Clear Return Information

Employer Name

Deceased Y/N ☐ Inactive Y/N ☐ Automatic Billing Y/N ☐ Office Location 1/2 ☐ Collections Y/N ☐ **N**

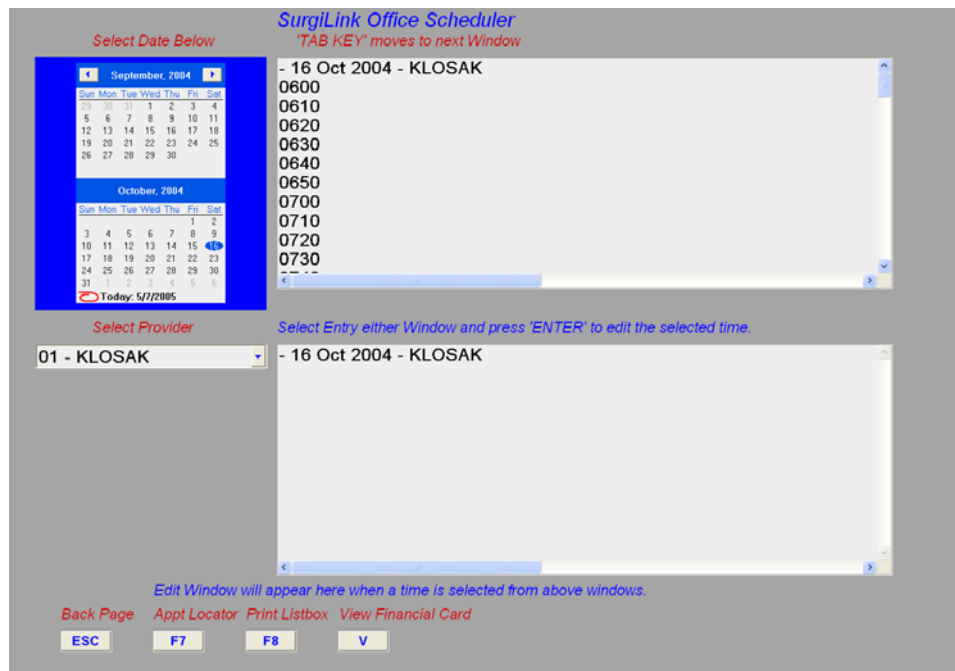
Leave Insurance Balances Process Entries Clear Info Print Info Appointment

ESC F3 F7 F9 F6 F8 F10

you can place up to 8 images or documents in each demographic page. These can be viewed by highlighting the choice in the drop down Scanned Image box and pressing the key 'V'. This should bring the image up for viewing in the Windows default viewer.

Scheduling

SurgiLink Office comes with a full function scheduler which is integrated into the Program for ease of use. The Scheduler can be accessed from the main menu by simply pressing the green schedule button.



Once in the scheduler you will see a calendar window in the upper left which allows selection of the date. And a provider selection box to allow the selection of a provider. Once these are entered any patients scheduled can be seen here. To make an entry simply select the time from the upper time window and press enter. A window will open to key in your entry and press enter or **F9** to save. The lower window shows any times that have entries and this can be printed easily with **F8**.

A special note is in order when scheduling a patient for an office visit or procedure. It is recommended that you enter the patients demographics first (at least name, ssn, dob) and press **F10** from the demographic page as this will place an entry in the appointment window of the patient demographic page. Also when you go to select a time for the patient, his name and phone will automatically be inserted in the scheduler. Also it is frequently convenient when in the scheduler to want to view a patients financial card to see if his charges. This can be done easily if you follow the above recommendation by highlighting his name in the time window and pressing 'V' to view the financial transaction card. Escape will return you to the scheduler.

Time Savers

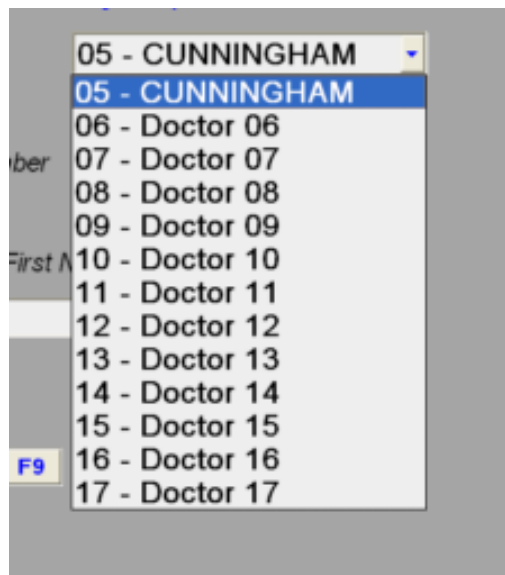
This section simply lists some very convenient ways to get around SurgiLink Office and save time and increase your pleasure in its use. *(Note that ALT- A indicates that you should press the ALT key and the A key at the same time.)*

ALT-N will initiate a new patient entry from anywhere in SurgiLink Office

ALT-L will locate a patient by Last name. simply enter all or part of the last and first names and the patient demographic page will appear. If multiple patients with the same name, such as 'Smith J', you will be offered to proceed to each match. With a complex name,'Mahadavia Afzal', and spelling not quite known. You could enter 'MAHA and A'. SurgiLink Office will locate the patient for you.

ALT-A will locate a patient by account number.

Provider Selection Windows



Most provider selection windows can be searched either by number 0-40 or by the first initial of the providers last name. so that if provider 05 is Cunningham. Rather than remember 05 = Cunningham, you can press the 'C' key and that provider will be show. If multiple Providers with same

initial, will go to the next with the next press of that key. I.e. 'D' will rotate through Doctor 06, Doctor 07, Doctor 08 etc.

Insert pressing the Insert button has different effects in different fields. In most date fields the current date will be entered. In the Insurance page of a patient, the ID# will change to the SSN entered. In the payment module, check # field. The last check number will be placed so no need to retype.

+/- pressing the + or the – key in most date fields will move the 8 digit date ahead or behind simplifying entries.

Rt Click The user may right click the mouse on any button for a brief explanation of the function that button performs.

Main Menu Page

SurgiLink Office is divided into 8 modules which are visible below.



Each can be selected by pressing the keyboard numeral linked to the button or use the mouse and click the button directly.

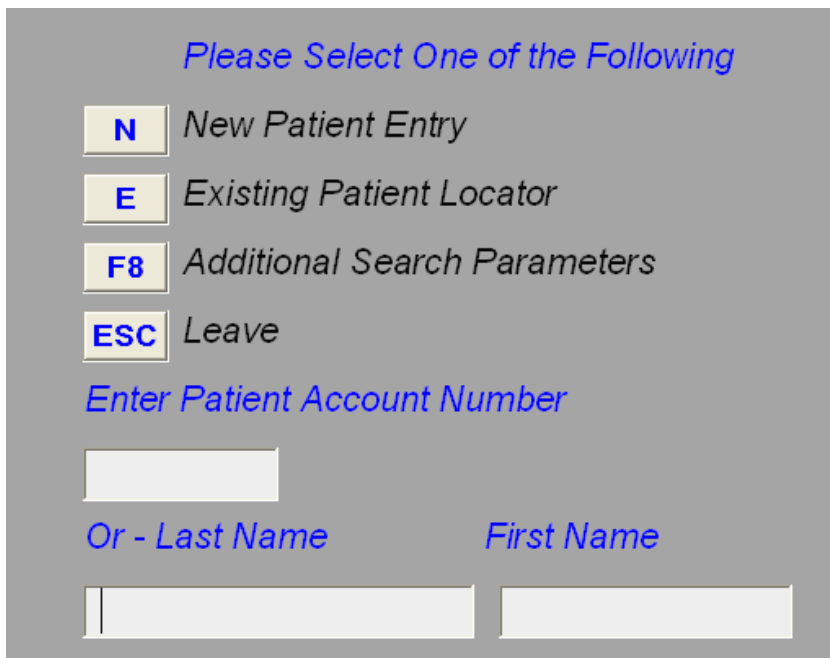
1) [Patient Locator](#) - or [Demographics module](#) is where new patients are entered and the demographics of existing patient can be reviewed or entered. There are also Hot links to go from the Demographics module to the Financial Card and Insurance Information.

2) [Insurance Forms](#) - The claim processing module allows entered charges to be sent by electronic or printed to a paper claim . . In addition you can [view the contents of an electronic file](#) here waiting for submission or [close and move electronic files](#) once completed

- 3) Financial Transactions - [The heart of SurgiLink Office](#). Generally once the patient demographics is entered this module allows the user to enter and process charges, payments and insurance filing. A succinct view of entered charges and payments is presented which can be easily reviewed and modified. Multiple buttons allow the movement to patient demographics or insurance with quick return for insurance filing. You can even restored damaged accounts from this module and Print Ledgers.
- 4) Statements - The [Statement module](#) allows the printing of a Single patient statement or a Complete monthly mailing.
- 5) Database - The [Database module](#) Is a crucial element of the SurgiLink system and allow the entry and editing of Referring Doctor UPINs, CPT codes and Charges, Facility information and All Insurance data is kept conveniently in this one module. Also Provider information and ID numbers is entered here. Caution should be used in who has access to this area as changes here can be network wide effect.
- 6) Reports - The [Report Module](#) is a collection of useful reports which allows the authorized user to Monitor the Financial situation, Delinquency reports, Analyses and much more is available here for the administrator or designated personnel.
- 7) Utilities - Is the [Setup area](#) of the Program where Printer alignment and adjustment is done, name list are compiled and several other functions to make SurgiLink run smoothly on your network or individual computer and printers.
- 8) Exit - Fast means of Exiting the program with saving of all buffered data.

Patient Locator

The Patient Locator module is the gateway to a patient's demographic page. Through this gateway the patient can be located by last name/first name, Account number, SSN or Date of Birth. Access this module by pressing **#1** on the main menu or alternatively Alt-L to find by last name or Alt-A to find by account number.



The screenshot shows a menu titled "Please Select One of the Following" in blue. Below the title are four options, each with a key in a box: "N" for "New Patient Entry", "E" for "Existing Patient Locator", "F8" for "Additional Search Parameters", and "ESC" for "Leave". Below these options is the instruction "Enter Patient Account Number" in blue, followed by a single-line text input field. Below that are two labels, "Or - Last Name" and "First Name", in blue. At the bottom are two side-by-side text input fields for last and first names.

Selecting '**N**' will bring up a New blank patient demographic page. (Note Alt-N will go automatically to a New patient form). Selecting '**E**' will bring up the account number window or the Last and First Name window. Regarding the name locator above. If you are uncertain of a last name spelling, you can enter partial last and first names and SurgiLink will bring up all the matches for you to pursue. For instance, if a patient is named *John Klosak* and you wish to find him; simply enter *Klos* in the last name box and '*J*' in the First and press **Enter** and SurgiLink will bring up all the matches for you to inspect in order. If you wish to locate by account number, simply enter the account number and press **Enter**.

Pressing **F8** will bring up a selection window as below with additional search parameters.

Please Select One of the Following

N New Patient Entry

E Existing Patient Locator

F8 *Compile Alphabetical name list*

ESC Leave

Enter SSN, whole or part

or - Date of birth (mmddyyyy)

With the above the user may enter the SSN or 8 digit Date of Birth to see if a match exists on SurgiLink. Alternatively a complete alphabetically sorted name list can be displayed or printed from this Menu.

Financial Transaction Module

Financial Transactions Account # - 2112

Last **KLOSAK** First **JOHN** Initial **J**

SSN **351483790** Birth Date **07131954** Gender **M** Home phone **3193326473**

Phys#	Service	Posting	CPT	Charge	Payment	Refund	Writeoff	Balance
1	20020521	20020521	35301		02031.90			-2031.90
1	20020521	20020521	35301	02031.90				.00
1	20020521	20020708	35301		00000.00			.00
1	20020521	20020708	35301		00000.00			.00
5	19921103	19921103			00100.00			-100.00
5	19921103	19921103	35454	00100.00				.00

Available Insurances **IL MEDICARE**

Comment

P Patient Info

I Insurance Claim

F7 Print Ledger

F8 Clear Comment

F9 Save Comment

Balances	KLOSAK	ABDULLAH	DOCTOR 3	DOCTOR 4	CUNNINGHAM
Total	.00	.00	.00	.00	.00
30 days	.00	.00	.00	.00	.00
60 days	.00	.00	.00	.00	.00
>90 days	.00	.00	.00	.00	.00

Leave **ESC** Next **F3** Prior **F4** Charge **F5** Payment **F6** Review **V** Delete **Del** Restore **R**

Generally the Financial Transaction Module will be your primary source of information regarding a patient account and from here all other functions are available. The most expediant way to get to this module is to press **Alt-L** or **Alt-A** to select an account by the patient last name or account number. This will take you to the patient demographic page where pressing **F7** will bring up the Financial Transaction Module.

Let's examine the fields:

The patient name and demographic information is displayed. These can be changed in the patient demographic page (and insurance page) accessible via the **'P'** button seen on the mid right. (you can click this with a mouse or more commonly simply press the **'P'** key).

Central List Box

A central transaction list box is present. This lists all the charges, payments and refund and wirtedoffs entered. Notice the box is automatically sorted by provider and date of service and posting. This sorting will place payments with the linked charges for easy balancing and analysis. The List Box also is the means for editing an existing charge or payment or deleting it altogether. To review an existing charge or payment simply cursor down to the desired transction and press the **Enter** key. The [charge](#) or [payment page](#) will be displayed where changes can be made and saved and will immediately reflected in the List Box. If you would like to delete an erroneous entry altogether, simply cursor down to the transction and press the **Delete** key. The entry will be permanently removed.

Balance Window

To the right of the Central List Box is the balance window which displays a balance for the provider as each transaction is entered.

Available Insurance

Below the Central List Box the insurances entered for this patient are listed. These can be altered in the Patient Demographic Module via the 'P' button seen on the mid right.

Comment Box

Below the available Insurance is a Comment box where the user can place an unlimited amount of information that they would like to save regarding this patient's account. In addition SurgiLink Office will automatically enter a comment for each Insurance Claim made either paper or electronic for reference later. The comment box automatically saves the contents every time the enter key is pressed or alternatively you can force a save by pressing the **F9** key. Also note the contents of the comment box can be cleared with the **F8** key.

Buttons

To the right of the Comment Box are five very useful buttons.

- S-** Prints a single Statement for this account.
- P-** Will bring up the patient demographic page where the user can make changes and save them which will return the user to this module.
- I-** Will access the Insurance Claim module for convenient filing of a paper or electronic claim. When done the user will be returned to this module.
- F7-** Print a detailed Ledger of all transactions on this account.
- F8-** Clear the comment box.
- F9-** Save the contents of the comment box.

Provider Balances

Below the comment box are the balance owed each provider sorted by total amount and 30, 60, 90 day delinquencies.

Buttons

Below the provider Balances are several more buttons which are needed to access additional functions (*you may click with a mouse or press the Keyboard*).

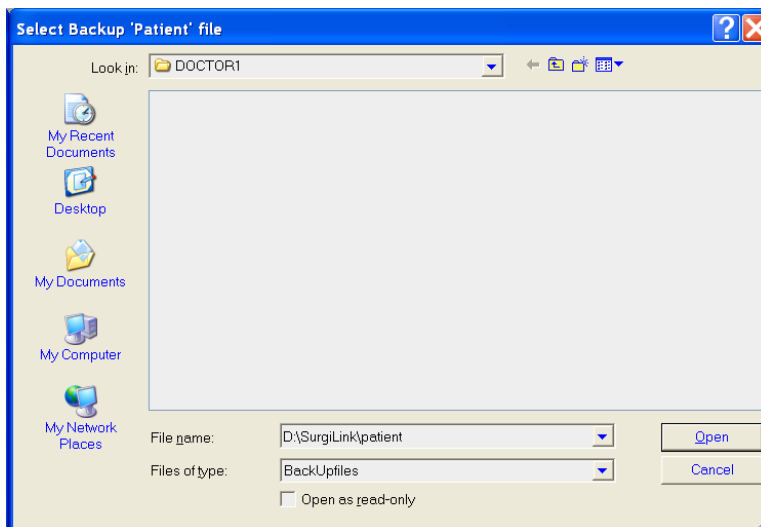
Escape

- F3-** Will Advance to the next patient account.
- F4-** Will Retard to the prior patient account.
- F5-** Initiate a New Charge Page on this account.
- F6-** Initiate a New Payment, Refund or Writeoff on this account.
- V-** Will bring up the selected transaction in the central list box for review and editing as needed
- Del-** The Delete key will permanently Delete the selected transaction in the central list box.
- R-** Allows the user to restore all transactions and data in an account to a previously saved version. See [Restore Account](#).

Restore Account:

The restore account function is useful if the user creates inadvertant deletions or if an account becomes corrupted by hardware errors. This function is accessible in the [Financial Transcation Module](#) by pressing the 'R' button on the lower right.

Generally, the user should have a saved copy of the data on a writable CD in the Disk drive (though you can also used the data saved in the [data backup](#) module) prior to pressing the Restore 'R' key



You should verify the location of the backup data as above and press 'Open'. SurgiLink will check that the last names match on the two accounts. If they do then the process will proceed and all data for this account will be restored permanently to the backup version, otherwise you will be cautioned about the discrepancy and asked to proceed or not. Again if you select 'Yes' the process will be completed and you should remove your backup disk.

Print Statements:

The SurgiLink Office Statement module is very easy to use and efficient. It allows the printing of one statement or a full complement. Simply enter the Print Statement Module from the Main Menu Page.

The screenshot shows a menu titled "Please Select One of the Following" in blue text. Below the title are three options, each with a button and a label: "1 Single Statement", "2 Complete Billing", and "ESC Leave". To the right of these options is a preview of a printed statement. The statement has a header with the word "STATEMENT" and a date field. Below the header is a large area with a grid of columns and rows, and a caduceus symbol in the center. At the bottom of the statement is a footer with the text "SurgiLink Office Statement".

And select single or a Complete Billing.

For the single statement you will be prompted for the account number and physician supplier for this account. Once you supply that press **F9** and the statement will be printed.

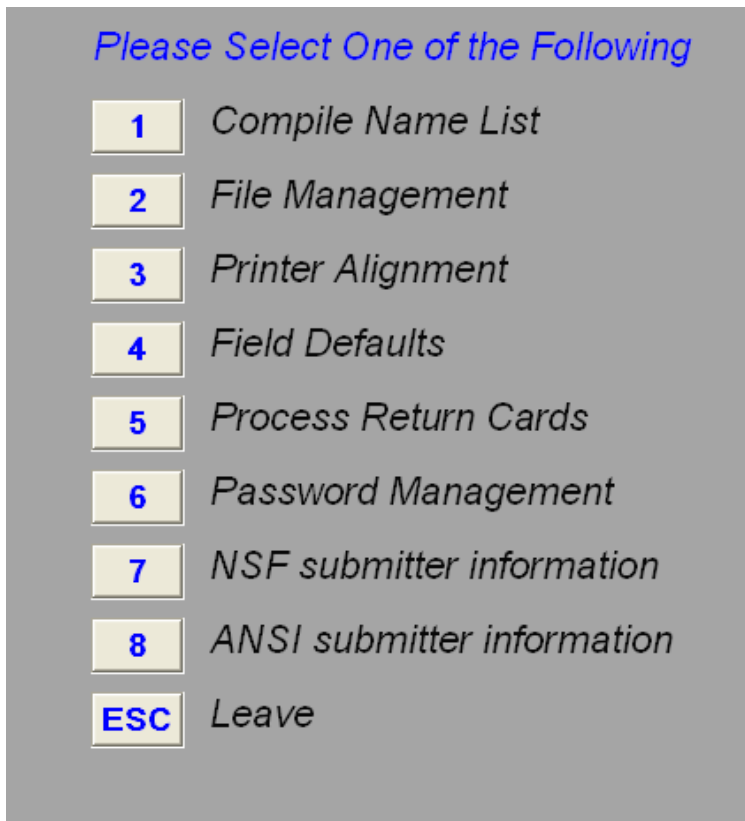
For the complete billing you will have several parameters you may wish to modify.

The screenshot shows a screen titled "Enter Days Delinquent" in blue text. Below the title are several input fields and buttons: "Select Provider Number" with a dropdown menu showing "1 - KLOSAK", "Enter Days Delinquent" with a text box containing "30", "Enter Beginning Acct #" with a text box containing "1", "Enter Ending Acct #" with a text box containing "13594", and "Enter a Comment Line" with a large text box. At the bottom are three buttons: "ESC Leave", "F9 Process Entries", and a button labeled "Blank Paper".

You will have to select the provider the statement is for and how many days delinquent

an account should be before SurgiLink Office generates a statement. 30 days is the suggested default. Also the beginning and ending account numbers should be confirmed. *Note-that if you are printing on blank paper and would like SurgiLink Office to generate a professional appearing backround please check the Blank Paper Box.* A comment box is present where you can include a brief message to be printed on everyone's statement if desired. Pressing **F9** will begin the process and it will continue until done. *A few additional points should be mentioned. SurgiLink Office will strive to generate no more than one sheet of paper per account. Also accounts that are checked inactive 'Y' or automatic billing 'N' in the patient Demographic Page will not be included in the Printing.*

Utility Module



The Utility Module is the location of several important utility functions you will need to keep SurgiLink Office running smoothly. In addition, if you are planning on submitting directly to medicare or a major insurance company this is the location to enter the provider data needed to generate either the NSF or ANSI 4010 file formats. For a clearing house such as WebMD these are not needed as they accept the PrintFile format which is basic to SurgiLink Office.

[Compile Name List](#) – The first module will recompile a new name list. This should rarely be needed but if SurgiLink Office is having trouble locating a patient by name and you are certain it was entered it is possible the name list has become corrupted and will need to be recreated. Selecting this button will create a new name list for SurgiLink.

[File Management Module](#) – Is discussed in the [next chapter](#) but includes many useful functions such as changing the Next new account number, Reset file busy flags, Change File Directory location for networking, Merge two accounts if needed into one, and A very Important Backup Module to backup the critical SurgiLink Office Files to prevent

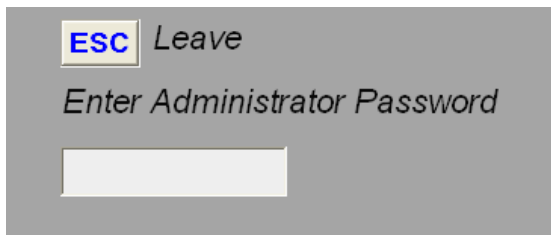
data loss.

Printer Alignment Module – To accurately align preprinted HCFA-1500 forms with the SurgiLink Office output, the printers occasionally need to be alligned with SurgiLink Office. The defaults will work fine with most printers but some require fine tuning and this is the module to perform this alignment.

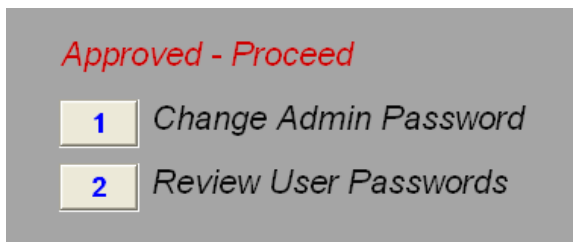
Field Defaults – Allows the customization of each copy of SurgiLink Office. In this module the user can adjust the Definable entry in the Patient Demographic page, Set the office location identifier in the Demographics page, Set the default for accepting assignment Y/N, Set the default type of service for use on Charge Pages, Adjust the amount of time allowed that SurgiLink Office can set idle prior to effecting an auto shut off, and Turn off the Mouse Hover messages.

Process the Return Cards – Allow the monthly printing of patient return cards for mailing.

Password Management – Is the module where passwords can be reviewed and changed. In additions users can be deleted here.

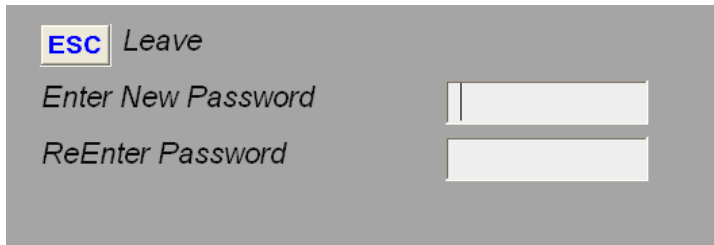
A screenshot of a software interface for password management. It features a grey background with a white rectangular input field for a password. Above the field, the text "Enter Administrator Password" is displayed in a black, italicized font. In the top left corner, there is a small button with the text "ESC Leave" in blue.

To access this module the user will need to know the Administrative password. The default password is 'surgeon' and should be changed to a private password know to the Office Manager. Simply key in the password in the box above.

A screenshot of a software interface showing a confirmation screen. At the top, the text "Approved - Proceed" is written in red. Below this, there are two numbered options, each with a small button containing a number in a blue box. Option 1 is "1 Change Admin Password" and Option 2 is "2 Review User Passwords". The text for the options is in a black, italicized font.

Simply select the function you wish to perform.

Change Admin Password –



ESC Leave

Enter New Password

ReEnter Password

Simply key in the new desired password twice and the New Password is in effect.

Review Users and Passwords – will bring up a list window with the current user initials and passwords.



AHA	2254
BMT	6298
MAY	051176
MEB	meb
MJK	rylee
MRA	kitten
PAM	dogcat
SEH	5740
SMD	3675

ESC Leave

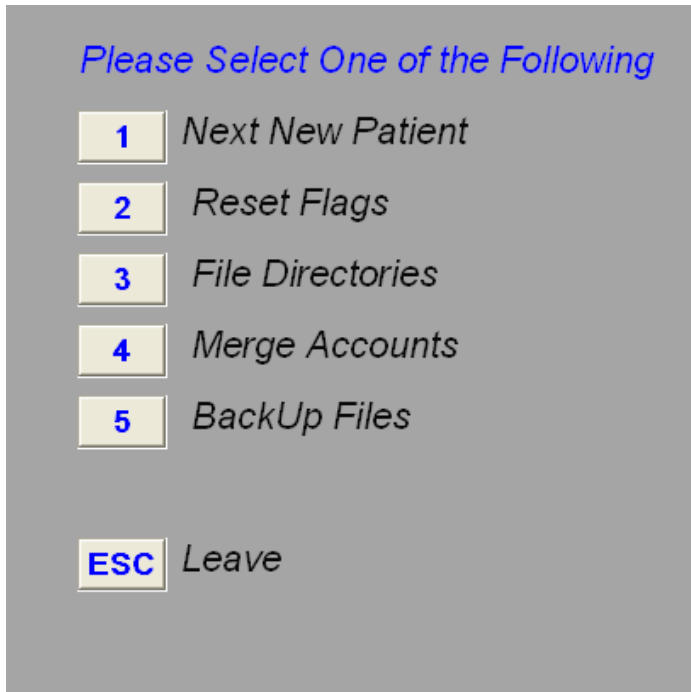
Del Delete Entry

To delete a user simply highlight the user and press the delete key.

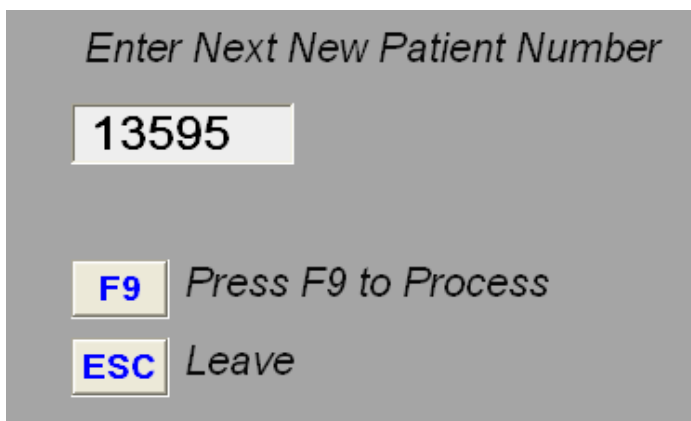
[NSF Submitter information](#) – Enter the provider data needed for NSF file submission.

[ANSI Submitter information](#) - Enter the provider data needed for ANSI file submission.

File Management Module



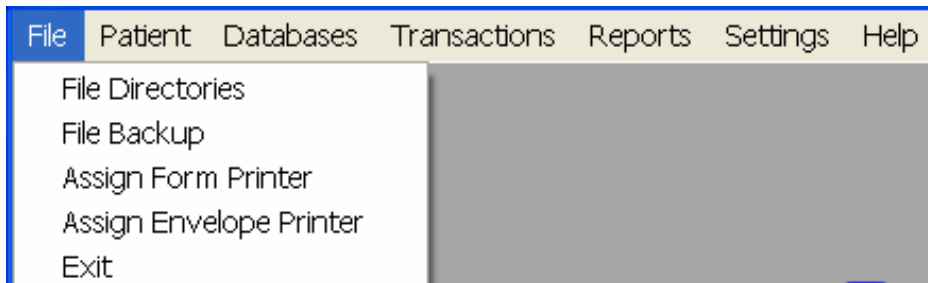
Next New Patient:



SurgiLink Office automatically advances the account number for new patients as they are entered. Rarely you may wish to change the index mark that SurgiLink maintains to a different value. When you select the Next New Patient function SurgiLink will display the image above which contains the next new account number SurgiLink Office would assign for a New Patient. You may change this to a number of your choosing. Press **F9** to save changes.

File Busy Flags: SurgiLink Office generally allows several users to access modules at the same time in a network environment. Occasionally you may wish to open more than one copy of SurgiLink Office per workstation also, such as, when you are compiling lengthy reports on one copy and wish to enter patient data on a second. A few exceptions exist in SurgiLink Office where only one user is allowed in at a time. Most notably the New Patient Entry Module. If one user is entering a new patient, SurgiLink Office will not allow a second user to also input a new patient at the same time. If a computer is inadvertently shutoff while inputting a new patient, the file flag may become *stuck* indicating the module is busy. If you receive a file busy message, and you are certain no other user is running SurgiLink, you may use this button to reset all file flags in the system. When done SurgiLink Office will show a 'successful' message.

File Directories: File Directory can also be accessed from the Menu Bar on the Main Menu Page.



SurgiLink Office uses several different files to store its data. These files are generally all kept in *C:\SurgiLink\.....* location. This location can be modified with the File Directory Module.

Enter Path and File name of requested Files

Patient File	Select	C:\SURGILINK\PATIENT
Names File	Select	C:\SURGILINK\NAMES
Charge File	Select	C:\SURGILINK\CHARGES
Payment File	Select	C:\SURGILINK\PAYMENT
Upin/Referring Database	Select	C:\SURGILINK\DATABASE\UPIN
Insurance Database	Select	C:\SURGILINK\DATABASE\INSURANCE
Facility Database	Select	C:\SURGILINK\DATABASE\FACILITY
CPT Database	Select	C:\SURGILINK\DATABASE\CPT
ICD Database	Select	C:\SURGILINK\DATABASE\ICD9
Provider Database	Select	C:\SURGILINK\DATABASE\PROVIDER
SurgiLink Help	Select	C:\MASM32\KLOSAK\SURGILINK\HELP\SURGHELP.HLP
Comment	Select	C:\SURGILINK\COMMENT
Scheduler Path Only	Select	C:\SURGILINK\SCHEDULE\
Statement BMP	Select	C:\MASM32\KLOSAK\SURGILINK\PICTURES\STATEMENT.DIB

Enter Paths & Extensions for Electronic Claim Files

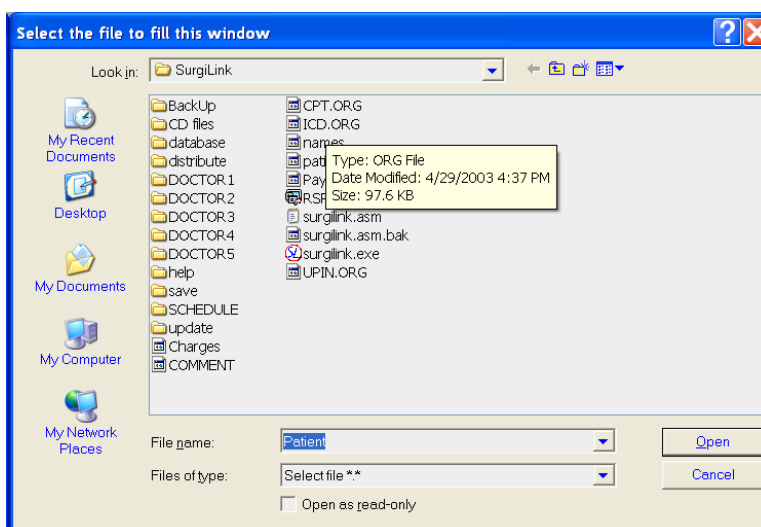
Doctor 1	C:\SURGILINK\DOCTOR1*.EF1
Doctor 2	C:\SURGILINK\DOCTOR2*.EF2
Doctor 3	C:\SURGILINK\DOCTOR3*.EF3
Doctor 4	C:\SURGILINK\DOCTOR4*.EF4
Doctor 5	C:\SURGILINK\DOCTOR5*.EF5

Enter Destination Path for Closed Electronic Files

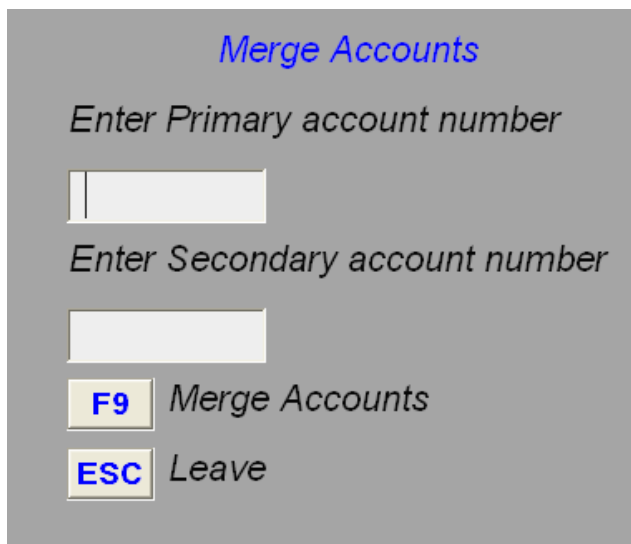
Doctor 1-5	A:\
------------	-----

In a Network environment with several workstations, it's important that all the workstations point at the same data. Generally in this case One server is designated the Main Computer and the other workstations 'Map' that server's C drive as Drive 'Z'. The the above directory locations are changed from the C Drive to the Z drive on the workstations. The Main computer should be left C Drive so that all computers are looking at the same information.

You may wish to consult a SurgiLink Office Network specialist to set this up for you. To select a new location simply press the 'Select' button next to the file name and select the new file from the file selection window shown below.



Merge Accounts: This module allows the combining of two accounts into one account and the release of the second account for future reassignment. SurgiLink Office screens against duplicate patient entries by comparing SSN and Names but occasionally a duplicate name may be entered in the system such that you wish to combined the accounts. Alternatively, for other reasons you may wish to move all the transactions from one account into another. When you enter this module the following window will be opened.



Merge Accounts

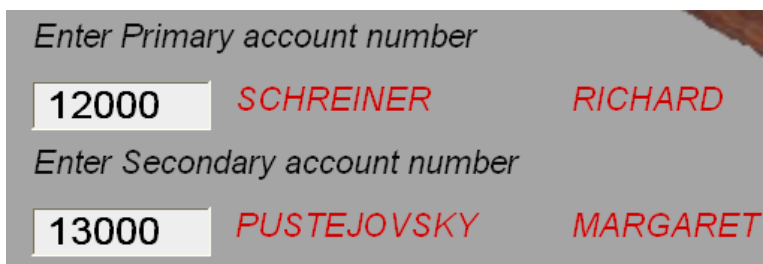
Enter Primary account number

Enter Secondary account number

F9 *Merge Accounts*

ESC *Leave*

You should carefully enter the Primary account number where you would like the final data to reside, and the secondary account number which will be emptied. Once you enter the primary account number, tab to the next field and SurgiLink Office will display the patient name for that account for your review prior to combining the data.



Enter Primary account number

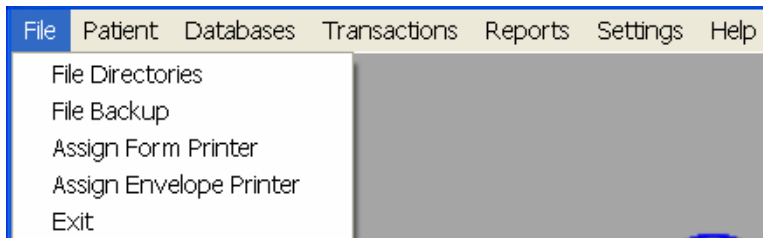
SCHREINER RICHARD

Enter Secondary account number

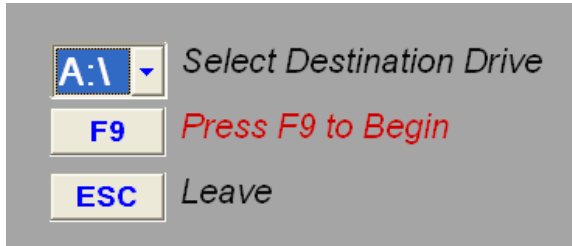
PUSTEJOVSKY MARGARET

Once you're satisfied press **F9** and the transactions and all data will be removed from the secondary account and combined with the primary data. The name in secondary account will be changed to 'Invalid Account'.

BackUp Files: The Backup module can be entered from the Utility Menu above or from the Menu Bar on the Main menu page.



SurgiLink Office recommends no less than daily backup of data or backup anytime you finished a significant amount of information entry. The Backup is easily accomplished in this module. Once entered the following window is opened.



Simply enter the drive to back up to and press **F9**. The files will be copied to that location. Generally you should select a harddrive not on the main computer so that if a catastrophic hard drive failure occurs a duplicate file set exists. Alternatively many computers now come with writable CD drives. You may very easily copy the entire C:\SurgiLink directory of the Main Computer to a writeable drive for safe storage off site.

Scheduler:

The Appointment scheduler is an integral part of the [SurgiLink Office](#) system. The Scheduler is efficient at entering patient appointments for all five practioners. Preferably the Scheduler should be opened from a patient demographic page by pressing **F10** but is also accessable from the Main Menu page by pressing the **green schedule** button.

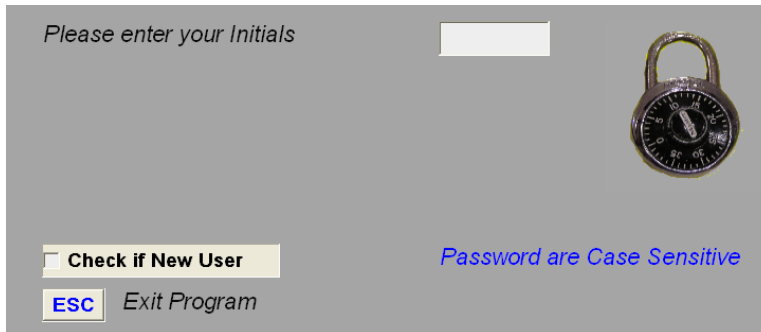
Once opened the Scheduler will open todays date with the Primary provider selected as the default as below.

Genrally you will want to **'tab'** until the Monthly calendar is **highlighted to blue** indicating it is active and then use the arrow keys to select the month and date you wish to issue the appointment. Once you have selected the appointment date, **'tab'** one over to the List box with the available times and arrow down to the open time you desire. Press the **Enter** key to select the time. The Edit box below will appear with the time and patient name and phone number inserted. Simply type in any additional information and press **Enter** and the data will be appended to the calendar.

Press **Escape** to leave the scheduler or **F8** to print a Condensed List box contents

Initials Field

Please enter your 3 initials at the Prompt



The User is *required* to enter their 3 Initials at the beginning of using SurgiLink Office as a means of tracking the users activities and entries. After the Three initials are placed, Surgilink will ask for your password. Press the Enter key when done with your password. This is any combination of letters or numbers up to 20 long. (*Note the password is Case sensitive such that Surgeon is different than surgeon.*) If this is the first time a user is accessing Surgilink they will have to establish a personal password to be recognized. Simply check the new user box and SurgiLink will ask for the Administrative password which is 'surgeon' unless altered. after surgeon is keyed in you will be asked for your initials and desired personal password. Each time you reenter SurgiLink please reenter your initials and password. After you enter your initials with the start of SurgiLink Office you will be taken to the module you chose. This entry will be retained until you exit SurgiLink Office. The users initials are placed on all Charge and Payment entries and also appended to insurance submissions.

Office Location :

Office Location 1/2 - Most Surgeons have one office and as such you would leave this area with the numeral 1. if you have 2 or more offices and would like to keep the patients and profit centers separate then you may indicate 1-9 in this field. You will see an option to select which office location you would like to review in several [report modules](#).

Note: The default setting here can be set between 1-9 in the [Defaults module](#). Generally should be left 1 unless several offices linked by VPN.

Printer Assignment:

You may setup your preferred form and envelope printer on the Main Menu Page menu at the top of the screen.



Simply select the menu entry from above and choose from the available printers.